

From the Ground Up: Understanding How Teachers and
Administrators Make Sense of Tension

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Abstract

Strategies designed to improve educational systems have created tensions in school personnel as they struggle to respond to competing demands of ongoing change within their daily realities. The purpose of this case study was to investigate how teachers and administrators in one elementary school made sense of these tensions and to explore the factors that constrained or shaped their responses.

A constructive interpretative case study using a grounded theory approach was used. Qualitative data were collected through document analysis, semi-structured interviews, and participant observation. In-depth information about teachers' and administrators' experiences and a contextual understanding of tension was generated from inductive analysis of the data.

The study found that tension was a phenomenon situated in the context in which it arose. A contextual understanding of tension revealed the interactions between the institutional, personal, and emotional domains that continually shaped individual and group behavioural responses. This contextual understanding of tension provided the means to reinterpret resistance to change. It also helped to show how teachers and administrators reconstructed identities and made sense in context. Of particular note was the crucial nature of the conditions under which teachers and administrators shaped meaning and understood change. This study sheds light on the contextual intricacies of tension that may help leaders with the complex design and implementation of educational change.

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Table of Contents

	Page
Abstract	ii
Acknowledgements	iii
List of Tables	vii
List of Figures	viii
 CHAPTER ONE: INTRODUCTION	 1
Background to the Study	1
Educational Policy in Ontario 1990-2003	4
Purpose of the Study	10
Importance of the Study	10
Organization of the Document	12
 CHAPTER TWO: LITERATURE REVIEW	 15
Philosophical Heuristic of Studying Tension	15
Educational Change	18
Teacher Stress	25
Tension	27
Responses to Change	37
Research Question	57
 CHAPTER THREE: RESEARCH DESIGN AND METHODOLOGY .	 58
Research Design	58
Phases of the Study	67
Methodology	73
Data Analysis	79
Development of an Interpretative Theory	87
Ethical Considerations	88
Summary of the Design and Methodology	90
 CHAPTER FOUR: CONTEXT OF TENSION	 92
Culture	93
Character of Change	98
Dimensions of Change	106
An Interpretative Perspective of the Context of Tension	127
 CHAPTER FIVE: MAKING SENSE OF TENSION	 131
Resistive Responses to Tension	131
Generative Response to Tension	146
Shifting Contexts: From Resistance to Generativity	157
An Interpretative Perspective of Making Sense of Tension	166
 CHAPTER SIX: DISCUSSION AND IMPLICATIONS	 169
Summary of the Study	169
Discussion	173

Implications for Educational Change.....	181
Future Research	183
Final Reflections	183
References.....	185
Appendix A: Interview Guide: Phase 2	203
Appendix B: Interview Guide: Phase 1	205
Appendix C: Interview Guide: Phase 4	206
Appendix D: Ethics Approval.....	207

List of Tables

Table	Page
1. Revisions to Initial Research Design.....	74

List of Figures

Figure	Page
1: Stages of Data Analysis.....	81
2: Activity System Framework.....	86
3: The Context of Tension.....	128
4: Making Sense of Tension.....	167
5: A Contextual Understanding of Tension.....	171

CHAPTER ONE: INTRODUCTION

Over the past decade, many strategies designed to improve educational systems through school effectiveness and improvement reforms have been implemented. Regardless of their success or failure, the efforts have left school personnel struggling under the tension of ongoing change as they attempt to understand and live with the day-to-day realities within schools. This study investigated the ways in which educators in one elementary school responded to and made sense of such tensions.

Background to the Study

Despite the intensifying interest in the problems of educational change over the past 3 decades (Fullan, 1982; Sarason, 1972), understanding how teachers and administrators experience tension related to these pressures has largely been ignored. These externally driven pressures drive the day-to-day demands in teachers' work and have considerably increased the psychological and workload effects on teachers (Kelley & Berthelsen, 1995). The demands affect teaching roles without teachers always knowing how to adapt to and cope with them. Because sources of stress are many and varied, a considerable level of caution is required by teachers to meet these changing demands (Kelly & Berthelsen).

The prevalence and sources of stress among teachers are important topics for research (Dworkin, 1997, 2001). Although the majority of stress research has focused on negative outcomes, it has long been recognized that stress has positive effects that can serve as motivational forces for performance, self-actualization, and personal growth (Selye, 1974). Because these positive aspects of tension are currently

undertheorized, the role that tensions play in change and innovation has recently captured the interest of educational researchers (Barab, Barnett & Squire, 2002; Barab, Barnett, Yamagata-Lynch, Squire, & Keating, 2002; Engeström & Engeström, 2000). Barab, Barnett and Squire, for example, point out that tension has helped to illuminate the dynamic interactions of change that lead to learning. Their work along with others (e.g., Engeström, 1993,1999) adopted an activity system framework that characterized tensions within communities of teachers to understand the dynamics of negotiating them. These studies lend support for exploring system tensions and provide useful ways of understanding school communities and the factors that promote sustainability and innovation (Barab, Barnett & Squire).

Existing studies of school change provide insights into its sustainability or nonsustainability (Hargreaves & Goodson, 2006), which have increased interest in investigating the nature of tension. To date, the educational change literature has dominantly positioned tension as personal, internal, and external conflicts that arise from change. Writers, for example, have described tensions as political conflicts (Apple, 2004; Hannay, Ross & Seller, 2005), structural contradictions (Fenwick, T. 2001, Fitzgerald, Youngs, & Grootenboer, 2003), organizational and power barriers (Abrams & Gibbs, 2000), cultural conflicts (Datnow & Castellano, 2000, Ryan, K. 2002), role and responsibilities differences (Datnow & Castellano, 2001); ethical differences (Campbell, 2005), and identity dilemmas (Woods & Jeffrey, 2002). While the educational change literature has identified various contradictions that create tension, it tends to ignore the problems of implementation (Gitlin & Margonis,

1995) and the deeper meanings of teachers' responses to these tensions (Hargreaves, 1998).

School change researchers have primarily viewed teacher response to school change in binary terms as either resistance or engagement. The issue of engagement has been considered a critical factor for successful reform efforts, whereas resistance has been viewed as a cause of failed reforms (Gitlin & Margonis, 1995). In a similar vein, resistance has been described in negative terms (Huberman & Miles, 1984) such as barriers (Giaguinta, 1973); irrational and adverse behaviour (Corbett, Firestone, & Rossman, 1987); silence (Sachs & Blackmore, 1998); and conservative or unwilling behaviour (Lortie, 1975). As such, teachers are viewed "as a conduit, not an actor" (Darling-Hammond, 1990), and resistive teachers are seen as obstacles to be overcome to achieve successful reform.

With respect to engagement, the school change literature has focused predominantly on the causes of nonengagement and potential ways to enhance engagement. Teacher engagement has been viewed in various positive ways such as collaboration (Hargreaves, 1995); a mechanism for growth and development (Fullan, 1999); and a means to diminish isolation and alienation of resistance (Gitlin & Margonis, 1995). Consequently, by viewing teacher responses to school change in binary, normative terms, researchers have "ignored the insights expressed in teacher resistance" (Gitlin & Margonis, p. 403) and have neglected the contextual factors that give rise to tensions and interrupted attitudes, practices, and ways of thinking (Sarason, 1971).

Educational Policy in Ontario 1990-2003

Tension has been a major issue in Ontario education for much of the past 2 decades. In this section, I draw from Anderson & Ben Jaafar (2003) to sketch a partial picture of educational policy in Ontario from 1990 to 2003. My intent in describing some of the major educational policy reforms is to set a broad context for understanding the changes that have influenced elementary teachers and administrators and shaped the realities of life in Ontario schools.

Since 1990, policy reforms have cluttered the educational landscape in Ontario. During this period, educational policy in Ontario underwent significant change in many areas of education, including curriculum, program structure, accountability, governance, funding, teacher professionalism, teacher working conditions, school safety, and school choice (Anderson & Ben Jaafar, 2003). This section is divided into two time periods to reflect the policy environments of different governments in power.

1990-1995

In 1992, the NDP government acted on its intent to destream grade 9; develop a new common curriculum for the primary, junior, and intermediate years; promote integration of special education students into regular classrooms; and provide senior and junior kindergarten. The introduction of the Common Curriculum: Policies and Outcomes, Grades 1-9 and Provincial Standards Mathematics, Grades 1-9 brought concepts of outcomes-based learning and curriculum integration into the Ontario curriculum policy. This new curriculum policy established prespecified learning outcomes; linked provincially defined standards across the curriculum; and integrated

traditional subject matter into four broad areas: language arts, mathematics and science, arts, and self and society.

After several incidents in schools across North America raised concerns about the safety of students, the 1994 Violence-Free School Acts articulated a new policy designed to prevent and respond to the rising violence in schools. Later in 2000, the conservative government introduced Bill 81 that adopted further measures to ensure discipline and safety in schools. Anderson and Ben Jaafar (2003) note:

Whereas the 1994 policy required school boards and schools to develop safe school policies, including discipline codes, Bill 81 The Safe Schools Act set a common provincial Code of Conduct for students, that included explicit standards of behaviour and consequences for serious infractions. (p.10)

A comprehensive review of education in Ontario by The Royal Commission on Learning (RCOL) engaged the public in 1993 in charting the future of Ontario education. Four key strategies for large-scale reform were envisioned: (a) new school and community alliances, (b) early childhood education, (c) professionalization and continuing development of teachers, and (d) new information technologies. This report, which contained recommendations to influence virtually all programmatic, organizational, and resources dimensions of elementary and secondary education in Ontario, had wide-ranging effects. Some of the key recommendations included expected learner outcomes, standardized report cards, standardized assessment, Ontario College of Teachers, and mandatory professional development and recertification. In response to the Royal Commission's report, the government

released a comprehensive policy document entitled *The New Foundations for Education*, but within 6 months the NDP government was defeated.

1995-2003

The common sense revolution brought in by the Harris government in 1995 marked the beginning of a sustained direction of reduced government bureaucracy and spending. During this time, some of the initiatives proposed by the NDP government continued, such as the Education Quality and Accountability Office, the Ontario College of Teachers, school board amalgamation, and the finance reform. However, Leithwood, Fullan, and Watson (2003) point out that the newly elected government “reversed many of the policies of the previous government, often just as schools had been coming to terms with new practices and requirements” (p. 9). The most dramatic action taken by the new government was the reduction in operating grants for school boards, which resulted in boards announcing teacher layoffs and cuts to programs and services.

Subsequently, several policy initiatives linked to the funding changes were passed by the government, such as the Education Quality and Accountability Office (Bill 30), Ontario College of Teachers (Bill 31), Fewer School Boards Act (Bill 104), Education Quality Improvement Act (Bill 160), and Education Accountability Act (Bill 74), all of which had broad implications for teachers and administrators. In particular, the scope of Bill 160 had direct consequences for teachers’ working conditions and administrators’ affiliation with teachers as Bill 160 enabled the removal of principals from the teachers’ collective bargaining units. This bill, which gave the government sweeping powers over the educational sector, sparked major

conflicts between teacher federations and the government. While Bill 160 ensured conformity across the province, it also guaranteed centralization and provincial control over funding levels and therefore over educational priorities. Leithwood et al. (2003) outline the overall impact of the legislative changes:

The provincial ministry took over more of the decision-making powers and rationalized expenditures for schooling. In a series of rapid reforms, the government cut the number of school boards from 129 to 72 and transferred many powers from school boards to the Ministry. The most significant and controversial legislation, the Education Quality Improvement Act, included provisions addressing funding, governance, class size, teaching loads and collective bargaining. The new funding formula centralized funding, shifting authority from local school boards to the government and removing the local ability to levy education taxes, which had been an important source of additional funding for many school boards. (p. 9)

The Education Accountability Act (Bill 74) extended and strengthened some of the government powers and regulations introduced initially under Bill 160 (Anderson & Ben Jaafar, 2003, p. 23). As had been the case with Bill 160, Bill 74 met widespread opposition, as it increased secondary teachers' instructional time, mandated coinstructional activities, granted principals' authority to assign coinstructional activities, and increased the average elementary school class size. These same issues underwent further reform in 2003 when Bill 28 recognized teacher unions "as mandating teachers to provide extracurricular activities" (Andersen & Ben Jaafar, p. 40).

In 1997, the Ontario Curriculum replaced the former Common Curriculum, which brought about several significant changes to elementary school curriculum: the emphasis on integration disappeared, subject-specific learning outcomes and standards by grade level (as opposed to division), new computerized standardized report card, and different content requirements. This change meant that teachers were faced with learning another new curriculum less than 5 years after they had begun to implement the previous one.

In 2001, the Quality in the Classroom Act passed another controversial component pertaining to the provincially mandated process for ongoing teacher appraisal. Whereas previous teacher evaluation policies had been local matters, this act brought the performance appraisal process under provincial control. The regulation stipulated that principals must evaluate teachers' classroom practice every 3 years, and it set out standard procedures by which they must conduct the appraisal. School boards were required to align their evaluation strategies and tools with the standardized procedures and to ensure that teacher competencies were assessed in accordance with the provincially determined Standards of Practice.

In 2002, the government commissioned an Education Equality Task Force to review the province's student-focused funding formula. This review, referred to as the Rozanski Report, focused on major aspects of the funding formula: funding distribution between different boards, structure of cost benchmarks, local expenditure flexibility, school renewal, special education, and student transportation (Anderson & Ben Jaafar, 2003). The recommendations not only called for more funding, but they also added some restructuring suggestions that would increase board autonomy to

support at-risk students. Despite additional funding, the recommendations were controversial. In spite of the controversy, however, Leithwood, et al. (2003) contend that a shift in the government's focus served to "reduce micro-management, increase policy coherence, and create high pressure/high support environments" (p. 38).

From the beginning to the end of the Conservative government in Ontario, the basis of policy implementation at the provincial level continued to highlight curriculum reform and the accountability of the teaching staff. The accountability question has been at the forefront of debate among teachers' unions, while the changes in curriculum have shifted expectations of both teachers and students. In addition, government policies for educational funding have caused tremendous tensions between the provincial government and teachers' unions (Anderson & Ben Jaafar, 2003). With more stringent measures of accountability and increased class sizes along with fewer resources and professional support, educators have struggled to uphold the expectations of maintaining a high level of education for elementary and secondary school students in Ontario (Anderson & Ben Jaafar).

These forced and often-contradictory policy directives have generated competing demands that created pressures for teachers and administrators. These pressures have affected the daily lives of school personnel and influenced teacher confidence, job satisfaction, school morale, and professional satisfaction (McNess, Broadfoot, & Osborn, 2003). Although research on school change has increased and expanded over the past decade, the focus has been predominantly on the processes that drive successful reform initiatives, and researchers have directed limited attention

towards teachers' and administrators' experiences of the tensions that accompany such large-scale reforms.

Purpose of the Study

The purpose of this qualitative case study was to investigate how teachers and administrators in one elementary school made sense of tension and to explore the factors that constrained or shaped their responses. Through a multiphased research design that involved interviews with participants, document analysis, and observations of participants, I have developed an interpretative theory of making sense of tension.

Research Questions

One main research question was explored in the broader context of change to understand: How do teachers and administrators make sense of tension? Specifically, this question was explored through the following empirical questions:

- How do teachers and administrators perceive tension to affect their work activity?
- How do teachers and administrators perceive tension to affect their interpretation and experiences of change?
- How do teachers and administrators perceive tension to shape or constrain their ability to negotiate change?

Importance of the Study

A study of tension appeared to be both timely and relevant. As Ontario educators and administrators continue to confront intensive changes that have transformed curriculum, policy, funding, legislation, and collective bargaining, there

has been little direct knowledge about the consequences of these initiatives on the implementers. A review of relevant literature also revealed little empirical research that related to teachers' and administrators' personal experiences of tension.

Therefore, investigating how school personnel encounter, interpret, and make sense of tension will enrich our understanding of and perspective on individual teacher and administrator responses to tension within the context of a single elementary school.

This focus enables "the voices of the people charged with the implementation of change" to be heard (Fink, 2003, p.107).

This study yields understandings about the factors and conditions of change that shape and constrain the ability of teachers and administrators to negotiate tension. The study design uniquely applies an activity system framework that describes the complex interplay between contradictory dimensions of change that create tension in schools. In so doing, the study offers to fill a potential gap in the existing educational change knowledge base about "how best to understand the context of change" (Bascia & Hargreaves, 2000, p. 15) and to better understand the various contexts that influence teachers' and administrators' responses to change.

Gitlin and Margonis (1995) argue that educational change researchers have primarily viewed engagement as a central feature of successful reform efforts and have considered resistance as an obstruction to successful reform efforts. They point out that resistance often makes good sense when issues are seen from the resisters' perspective. This study seeks to understand how school personnel encounter, interpret, and make sense of tension. In this way, the findings can enhance understandings of resistance and engagement as appropriate and insightful responses

to change. Additionally, this study attempts to expand understandings of the complexities of change and the various dimensions of change that influence tension and school personnel responses to tension.

Finally, this study enhances understanding of the emotional nature of responses. The exploration takes up questions posed by Sachs and Blackmore (1998) about “the contexts which give rise to emotional responses and how these expressions are displayed and negotiated by all of those involved in the life of a school” (p. 277). Through this investigation, I hope to enhance understandings of how school personnel manage the transition through change (Bridges, 2001,2003), an important area that has been largely neglected in the educational literature.

Organization of the Document

The intensifying interest in educational change has largely ignored the experiences of tension that school personnel encounter. In Chapter One, I briefly present the rationale and purpose of the study and sketch a brief picture of educational policy in Ontario since 1990 as a backdrop to situate the investigation. A detailed explanation of the importance of the study indicates how it contributes to the knowledge base of educational change.

In Chapter Two I examine selected relevant literature that supports the rationale for the research by addressing the areas of knowledge that the study is intended to expand. The chapter begins by situating the study of tension in a philosophical heuristic that ties constructivism and sensemaking together. Drawing from the fields of philosophy, sociology, education, and psychology, the literature

review focuses on understanding educational change, teacher stress, tension, and responses to educational change.

In Chapter Three I situate the study in a theoretical framework and outline the rationale for a qualitative, interpretative case study. The chapter then describes the researcher interests, methodological issues, research setting, phases of the study, data collection procedures, stages of data analysis, and the explanation for building an interpretative theory. The ethical considerations and strategies that contribute to the trustworthiness of the data are included in the final section of the chapter.

Chapters Four and Five present the study findings. Chapter Four presents the descriptive data related to the context in which tension arises. The context of tension sketches a picture that illustrates the culture, the nature of change, and the dimensions of change that influence tension. A narrative and graphical summary presents an interpretative theory of the context of tension. These results provide the broad context in which to situate the results of Chapter Five that respond to how teachers and administrators make sense of tension.

In Chapter Five I present the grounded theory analysis and interpretation of the research findings related to how school personnel encounter, interpret, and make sense of tension. The chapter documents in detail two main responses and the various strategies that teachers and administrators used to negotiate tension. The chapter goes on to outline the various contextual elements that provide the basis of shifting responses. A narrative and graphical summary of the grounded analysis presents an interpretative theory of making sense of tension.

Based on the analysis and interpretation of the findings in Chapters Four and Five, in Chapter Six I elaborate on the results by discussing them in light of the existing literature. These discussions provide the basis for delineating theoretical and practical implications of the results as well as a guide to future research questions.

CHAPTER TWO: LITERATURE REVIEW

This chapter begins by outlining the philosophical heuristic to study tension. The remainder of the chapter consists of a review of the empirical literature related to tension and educational change and is organized into three main sections. The first section is a review of the general literature of educational change with specific focus on the forces of change and teacher and administrator agency. The second section is a review of the educational, psychological, and sociological literature related to teacher stress and tension. The third section reviews school personnel responses related to change.

Philosophical Heuristic of Studying Tension

Social constructionism (Berger & Luckmann, 1966) provides the central philosophical foundation of this research study. The work of Emile Durkheim (1964) is used to provide an historical context to add conceptual richness with his notion of collective consciousness and social group. The writing of Mary Douglas (1986) offers a contemporary flavour of collective action through institutions.

The central interest of social constructionism is to discover the ways in which social reality and social phenomena are constructed. It takes as its primary lens the ways in which social phenomena are created, institutionalized, and traditionalized. Socially constructed reality is thus seen as an ongoing, dynamic process that is reproduced by people acting on their interpretation and their knowledge of reality. As such, social constructionists accept that social realities exist and can be measured and analyzed. Underlying this notion is the idea that consciousness and mind do not

simply exist in a substantive sense but also exist via communication and that individuals experience and live within common social realities.

Sensemaking as interpreted by constructionists is viewed as subjective, internal, often implicit, and not able to be wholly communicated or shared by another. Weick (1995) contends that sensemaking is essentially a process that culminates in interpretation. He explains that

sensemaking is about such things as placement of items into frameworks, comprehending, redressing surprise, constructing meaning, interacting in pursuit of mutual understanding and patterning. It is not synonymous with interpretation or decision-making. It is not interpretation as it encompasses more than how cues, information is interpreted, but is concerned with how the cues were internalized in the first instance and how individuals decide to focus on specific cues. (pp. 7-9)

Weick further explains that

to talk about sensemaking is to talk about reality as an ongoing accomplishment that takes form when people make retrospective sense of the situations in which they find themselves. There is a strong reflexive quality to the process. People make sense of things by seeing a world on which they already imposed what they believe. (p. 15)

The underlying mechanism of sensemaking is a thinking process that uses retrospective accounts to explain surprises—a recurring cycle comprised of a sequence of events occurring over time (Louis, 1980). As such, meaning-making is both experiential and cognitive and is of particular importance in understanding how

individuals encounter, interpret, make sense of, and accommodate tension through change. Sensemaking is a process whereby individuals interpret change and adjust their thinking to understand events around them (Weick, 1995), and change *per se* involves a fundamental alteration in the social construction of reality (Berger & Luckmann, 1966). This process of reality construction includes the enactment of everyday activities and meaning-making, which is at the heart of sensemaking.

A further component of the philosophical framework is the concept of institutional control. Berger and Luckmann (1966) contend that institutions are collections of shared expectations that subject human activity to habitualization. Although habitualized actions retain their meaningful character for individuals, these meanings become embedded as routines that lead to a general stock of knowledge. As routines become more deeply embedded, their origins are lost and they become taken-for-granted truths rather than social constructions. Thus, habitualization provides an important individual gain of narrowing choice and minimizing decision-making. Similarly, Douglas (1986) argues that decisions are largely shaped by the institutional *thought world*, a concept equivalent to Durkheim's social group, whereby people accept the images, symbols, ideas, and experiences that have been (sometimes tacitly) agreed upon as true or valuable by their institutional or social group. These common agreements shape perception and belief and can ultimately lead mindsets toward a general stock of knowledge. Thus, institutional thought worlds serve to order experience and memory, to control individual perception and reaction to change, and thereby to constrain individual decisions (Douglas).

Institutionalization implies historicity, which reinforces the importance of bringing to light the tensions embedded in taken-for-granted activity (Berger & Luckmann, 1966). These taken-for-granted routines are tied to images, objects, and beliefs that are transmitted as traditions through history. In the course of shared history, the accumulation of reciprocal actions between individuals and their organizations makes it impossible to understand an institution adequately without first understanding the historical process in which it originated. Shils (1981) argues that

what particular actions, complexes, and sequences of actions leave behind are the conditions for subsequent actions, images in memory and documents of what they were when they happened and, under certain conditions, normative precedents or prescriptions for future actions. (p. 12)

These images of know-how, scripts, rules of thumb, and heuristics all represent symbolic encodings of work that enable transmission across generations. Thus, to explore how people make sense of tension means paying close attention to these descriptions and being conscious about actions that one takes for granted, which will mean punctuating and labeling those actions in ways that preserve their unique form.

Educational Change

In the 1960s and 1970s, internal change followed a stage theory approach where teachers and professional groups played central roles in initiating and promoting educational change (Goodson, 2001). The internal locus of control shifted in the early 1980s as changing patterns of globalization and government involvement began to influence the school effectiveness movement. This first-wave movement emphasized centralized governmental control of standards for teaching, standards-

based curriculum, and an increase in mandated testing and accountability with a decrease in teacher autonomy (Bascia, 1996). The shift to external control left internal change agents facing a “crisis of positionality” where their positional strength to initiate and promote educational change had been substantially preempted by external groups (Goodson, 1999, p. 281). In this crisis of positionality, Goodson argued that internal change agents became conservative respondents and often opponents to externally initiated change because the personal and institutional drives and desires that underpinned change initiatives had diminished. Goodson argued that “the ruptures between external and internal forces may be an educational change process that is riven with conflict and dysfunctionality on an epic scale” (p. 48) because the separation of internal motivation from external imperatives failed to ensure that improvement plans would be internally implemented and sustained.

The political push towards district control in the late 1980s ushered in a second wave of reform that emphasized school improvement and the notion of decentralized decision-making (Bascia, 1996). This decentralization fostered processes that were more attuned to school improvement changes, internal capacity building, professional learning, and teacher empowerment (Hannay & Ross, 1999; Hargreaves, 2000; Mitchell & Sackney, 2000). The school improvement literature of this era stressed internal capacity of schools to foster educational innovation, participatory leadership, and policies and practices for sustaining change. Second-wave researchers focused on the cultural ways of teaching that either enabled or limited reform success (Gitlin & Margonis, 1995) and identified teachers as solutions of educational reform (Hanson, 1991). The empowerment of teachers (Smith &

Lusthaus, 1995) and the development of collaborative school cultures (Gitlin & Margonis) became the second wave's currency as a means to overcome isolation and alienation of teachers. Gitlin and Margonis argued that the early emphasis on engagement positioned resistance as a problem to overcome in the search for stability rather than as an important and valuable source of information about specific changes or improvement plans.

Goodson (2001) attempted to integrate these two waves of reform by setting out a new direction for thinking about educational change theory. Using a sociohistorical perspective, he identified an internal, external, and personal approach to examine a number of different change processes. He argued that, by developing social histories of educational change, researchers could raise awareness of certain disruptions as the conditions of change themselves change. Goodson suggested that there is a phase of change that acknowledges the force of personal identity and believes that change and reform must be seen as going both ways, both into and out from the school. He argued that, unless a fully conceptualized notion of the connections between the internal, external, and personal is understood, change theory will remain underdeveloped.

His theoretical arguments have been supported by data from a longitudinal research study involving 474 teachers. In their study, Hannay et al. (2005) examined the restructuring efforts that one school district, their nine secondary schools, and respective teacher unions engaged in during a schoolboard amalgamation process. Retrospective survey and interview analysis revealed that forced amalgamation between two school boards and their respective union affiliates perpetuated a

paradigmatic clash, which negatively influenced their organizational change efforts.

The authors used a matrix construct to examine and map different policies that internally and externally initiated change within the school and the school system.

They concluded that external forces for reform must foster strategies that enable school-level educators to translate policies into practice. They cited a need to develop strategies that recognized Elmore's (2002) "reciprocal accountability" and Fullan's (2000) "downward investment/upward identity" as possible ways to achieve sustainability.

Reciprocal accountability is defined by Richard Elmore (2002) as a foundational principle of instructional leadership. He states:

If the formal authority of my role requires that I hold you accountable for some outcome, then I have an equal and complementary responsibility to assure that you have the capacity to do what I am asking you to do. (p. 21)

Elmore argues that building accountability for capacity requires school boards and administrators to invest in the knowledge and skills of educators, provide professional development, and equip teachers with strategies and resources to meet the needs of their students. Elmore notes that threads of mutual accountability that connect people in a system include key components such as high standards, adequate resources, capacity for teaching and learning, fair assessments, strong reporting, and long-term planning systems.

In a similar vein, Fullan (2000) suggests that downward investment/upward identity is a key factor for building system capacity and sustainability. He argues that downward investment strategies involve "allocation of resources to increase the

capacity of people to make improvements, whereas upward identity acknowledges all people identified with successful accomplishment” (p. 22). Fullan suggests that, unless the system promotes “commitment in educators and the public, as shareholders with a stake in the success of the system as a whole, reform cannot be achieved” (p. 23).

Hargreaves and Goodson (2006) shed fresh light on the prospects for and sustainability of contemporary movements in standards-based reform. In their landmark longitudinal study involving teachers and administrators of eight U.S. and Canadian secondary schools, they identified five major internal and external change forces that influence the direction of life in school and those who work within it. They found that waves of reform, changing student demographics, teacher generations, leadership succession, and school interrelations were forces that influenced sustainability of change. The authors found that teachers and administrators accepted or resisted particular reforms based on associations with their generational missions, academic subject orientation commitments, and school’s identity. Their findings revealed the cumulative and contradictory effects that waves of reform have had on teachers with mature lives and long careers. In her review of this article, Louis (2006) noted that all five change forces were outside the control of schools, which left control largely unmanageable at the local level. These results speak to the importance of exploring how change influences school personnel at the local level.

In another of the *Change Over Time* articles, Goodson, Moore, and Hargreaves (2006) viewed reform sustainability through the lens of teacher nostalgia. In their study, nostalgia took two forms: social and political. They referred to social

nostalgia as “memory associated with home, family, and community” and to political nostalgia as “ideologically charged memories of lost status, power, self-determination ... that intensify during and following periods of economic recession and civil unrest” (pp. 44-45). Goodson et al. found that teacher narratives reflected a pervasive nostalgia for the past with two dominant themes that fueled their opposition to change. The first theme, rooted in social nostalgia, related to the changed culture of motivated students and committed teachers. The second theme, rooted in political nostalgia, showed that teachers felt insulted by standardized reforms. The authors attributed the loss of teacher autonomy over time to their retreat from political engagement and consequently to personal disillusionment. They argued that teachers were more likely to engage in change efforts if the designs and development were respectful and inclusive of their meanings, missions, and memories. Their findings place importance on acknowledging and engaging teacher missions and memories to achieve sustainability.

Other studies have also addressed the complexity of change. Capra (2002), for example, attributes the deep malaise of many leaders to the increased complexity of change. In his work, he applied social theory to speculate on the extent to which human organizations could be viewed as living systems. He argued that sustainability required a fundamental redesign in order to bridge the disconnection between human design and sustainable ecological systems in nature. He argued that bringing life into human organizations by empowering their communities of practice would enhance the connections between individuals. His conclusions are consistent with previous studies that have urged leaders to shift their priorities towards developing the creative

potential of their employees, enhancing the quality of the internal environment, and integrating the challenges of ecological sustainability to enhance the well-being of humans.

In a similar vein, Hargreaves and Fink (2006) calls for a multidimensional reach that stretches far, wide, and deep to achieve sustainable educational change and leadership. They argue that sustainable leadership places prominence on learning, capacity, and distributed leadership and consists of interconnections and interrelationships that honour the past. They conclude by reinforcing the importance of joining the interconnected spheres of influence between the school, locality, and the nation. Their findings suggest the need to understand the relationships and interconnections that support sustainable change.

Outside the literature of educational change, researchers have recognized complexities of change as forces that act to “expose meanings to reconstruction” (Ericson, 2001, p. 300). These forces have been specifically characterized as orders of change (Ginsberg, 1988). Ginsberg describes *first order change* as superficial and not altering structure, while *second order changes* involve the system directly. Ginsberg argues that such second order changes are often dramatic and traumatic because they reflect a more fundamental alteration. Increasingly, these types of changes are considered not just shifts in norms, structures, processes, and goals but also substantive modifications in the social construction of reality (Berger & Luckmann, 1966). This latter view of change speaks to the importance of understanding the multidimensional reorientation that change has on individuals in organizations (Gioia,

Thomas, Clark and Chittipeddi, 1994) and implies that the educational change research has conceived of change in a limited, fragmented context.

Teacher Stress

Considerable research has been devoted to teacher stress in recent years. Stress has been variously defined by researchers as negative emotional experiences (Kyriacou, 2001); the degree of mismatch between demand and ability to cope; teacher burnout; or emotional, physical, or attitudinal exhaustion (Chaplain, 2001; Sheesley, 2001; Vandeberghe & Huberman, 1999). The majority of research in the field of stress has focused on the negative outcomes of stress. However, it has been recognized that the positive effects of stress serve as motivational forces for performance, self-actualization, and personal growth (Selye, 1974). Selye (1956) coined the terms *distress* (negative stress) and *eustress* (positive stress) and positions stress, *distress*, and burnout on a continuum (Selye & Cherry, 1978).

In her study using survey questionnaires, Kyriacou (2000) found that approximately 25% of schoolteachers regarded teaching as a *very or extremely stressful* job. To date, the most widespread measures of teacher stress have been quantitative methods that included the use of self-report questionnaires and psycho-physiological assessment. These summative methodological approaches to stress have restricted teachers' responses to lists of items on a 5-point scale that may cloud the quality of response. While survey research has dominated the approach to explore teacher stress, the literature is slowly accumulating a series of qualitative works that include interview surveys and case studies of stress (Kyriacou).

Using qualitative data, Blase (1986) investigated teachers' perceptions of work stress. To explore sources of teacher stress, Blase used an open-ended Teacher Stress Inventory instrument to gather qualitative data from 392 elementary, middle, junior, and high school teachers enrolled in graduate courses of education,. He found that organizational, student, administrative, and teacher factors were most frequently related to teacher stress and together constituted 83.1% of the responses. Job-related factors were considered stressful because they were perceived as interfering with time resources, which overloaded teachers. The findings also showed that work stress was linked to strong negative feelings in teachers that were expressed as anger towards others.

McCormick (1997) used an attribution-of-responsibility model of occupational stress to examine differences in stress of teachers. The attribution-of-responsibility model is concerned with how teachers cognitively organize domains to which they attribute responsibility for their occupational stress. In his study, McCormick used questionnaire data from a large representative sample ($n = 487$) and qualitative data from a random sample of 24 of 119 teachers who volunteered to be interviewed. He found that teachers attributed occupational stress to five domains: (a) external domain related to government demands for change, (b) student domain related to student motivation and behaviour, (c) time domain related to insufficient time, (d) school domain related to level of supports, and (e) personal domain related to self. Overall, the findings showed that rural teachers experienced less stress than urban teachers, executive teachers generally experienced greater stress in the external domain than classroom teachers, veteran teachers (greater than 15 years service)

experienced less stress in the school domain, and primary teachers reported less stress than their secondary colleagues. The findings emphasized a need to differentiate between work groups, school contexts, the perceived objective strength of a stressor, and the degree of distress felt by a teacher.

Research on teacher stress has established itself as an international research interest that has set forth future agendas for investigating teacher stress. In setting future research, Kyriacou (2001) articulated five directions: (a) to monitor effects of educational reform on teacher stress, (b) to explore positive responses to stress, (c) to clarify the nature of stress related to excessive demands and self-image, (d) to assess the effectiveness of intervention strategies, and (e) to explore the impact of teacher-pupil interaction and classroom climate. These future directions support the need to investigate stress related to educational change and the organizational contexts that enhance teaching and learning.

Tension

In this section of the chapter, I have organized the literature related to tension around three perspectives: (a) external tensions, (b) internal tensions, and (c) personal tensions related to educational change. External tensions operate at the policy level and influence the school and school district. Internal tensions operate at the school level and directly affect operational functioning of the school. Personal tensions operate at the individual level and directly influence school personnel.

External Tensions

Apple (2004) used international empirical data to raise questions about current reform efforts and the hidden differential effects of the neo-liberal-inspired market

proposals and neo-liberal, neo-conservative managerial-inspired regulatory proposals. He argued that these different interests and visions compete for domination in the social field of power surrounding educational policy and practice. His analyses identified several complexities and imbalances in power: markets and performance, competing visions, new markets, old traditions, and national curriculum and testing. Apple concluded that the complexities and imbalances tend towards perpetuating both dominant pedagogical and curricular forms and the ideologies and social privileges that accompany them.

Similar tensions have arisen between the political nature of education and the agenda that promotes education as a public good. Easley (2005), a Martin Luther King, Jr., scholar, argues that tensions between politics of education and education as a public good are perpetuated through the language of school reform. He suggests that the No Child Left Behind Act (NCLB) attempted to improve public education by holding states and schools accountable for closing the achievement gap through wedding performance and budget, which inherently sets up tension. As such, he argued that the NCLB's technically rational accountability system of power shifted the blame for school failure towards teachers. Although NCLB appeared to overturn practices that masked inequity of achievement levels, Easley speculated that the title of the act was nothing more than a political slogan, one that in fact left behind the children who needed assistance. His conclusions were consistent with other studies that called for reciprocal accountability strategies that held all stakeholders responsible for the success of schooling.

In their longitudinal study Hannay et al. (2005) examined the impact of emerging paradigms and cultural clashes on large-scale organizational change. They developed a matrix framework that illuminated the tensions that inherently contributed to failed change efforts, specifically, in their case, a forced amalgamation between two school districts that had different fundamental beliefs and operational patterns. The authors found that philosophical clashes between school effectiveness (external control) and school improvement (internal commitment) ideologies negatively influenced the restructuring process, school structures, and collaboration of the amalgamation. They found that external power struggles had negatively influenced the organizational change process, and they argued that driving forces for reform cannot be just external.

Internal Tensions

School level tensions related to the politics of rules, laws, and procedures have also constrained the internal functioning of schools. Cooper, Ehrensals, and Bromme (2005) explored the micropolitical context in which supervision and evaluation occur. They argued that the environment in which teacher-principal interactions occurred were shaped by union contracts, state and district personnel policies, and precedents set by local experiences with teacher dismissal. They found that historical and structural factors converged to create three major traps that complicated principals' supervision of teachers: (a) the bureaucratic organization and labour-management relations, (2) the semiprofessional character of teaching, and (c) the collegiality of leadership and teacher empowerment. They speculated that improved methods of teacher evaluation, teacher collegiality, teachers as self-directed professionals,

payment by results, distributed leadership, and participatory decision-making were various strategies that would release these traps.

Accountability structures have also placed contradictory pressure on teachers and administrators. In her study, Fenwick (2001) focused on three schools considered successful because they had shown strong leadership and commitment to implementing teacher professional growth plans (TPGPs). Fenwick used a micropolitical lens to examine the mandatory implementation of TPGPs using qualitative data of 11 teachers. Her findings resulted in three contradictions related to power and knowledge: (a) teacher self-direction versus increasing surveillance; (b) multiple ways of knowing versus technical learning; and (c) teacher risk-taking, creativity, and learning versus standardized expectations. She concluded that, despite differential findings, the TPGP initiative had generated positive results related to teaching practice, collaboration, decreased anxiety, and increased commitment to learning. These findings may in part be due to the timing of the study, which was conducted 3 years past the initial implementation; however, the results provide support for a relationship between teacher-leader trust and teacher participation in change initiatives.

T. Fitzgerald et al. (2003) argue that regulated and bureaucratic systems place teacher appraisers in contradictory relations and create tension for teachers and principals. Using a standardized instrument with 268 subjects (58.7% return rate), they found that teachers' desire to be accountable for their professional work and their direct involvement were critical to success. These findings also provide support for examining the integration factors of performance appraisal that engage teachers.

Structural tensions linked to organizational barriers and power relations have been related to school-community collaboration. In their longitudinal study of 21 school staff and 14 community members, Abrams and Gibbs (2000) found tensions related to power, class, and race. In their study, the authors explored the barriers and opportunities of building school-community collaboration in an ethnically diverse urban school. The findings revealed that the complex environment and the various dimensions of change disrupted the functionality of the school. These results support a need to understand the effects of decision-making choices on various dimensions of change and vice versa.

These findings are consistent with a case study aimed at improving parental involvement which involved inner-city teachers, parents, and university personnel. In this study, Tatto et al. (2001) found that parental involvement was limited by organizational structures, balance of power and control, teacher perceptions of parents, and cultural forces. They found that vague rules and poor communication structures negatively affected easy access for some parents and children. Tatto et al. concluded that educational policy regarding parental participation required clear standards and accountability mechanisms for teachers to support parental involvement.

According to Fenwick (2001), structures of power that impose technical models of control and surveillance on teacher learning represent contradictory interests. The main problem is that institutionally embedded power dynamics and power structures are ingrained within the culture of schools. For example, Tatto et al. (2001) found that institutionalized power mechanisms were used to control

students' actions and parents' involvement. Busher and Harris (1999) also found that middle management faces cultural tensions through structures, social cohesion, internal, and external relations. Their study concluded that effective management required staff involvement at all levels and that heads of departments played a central role in collegial subcultures. In a similar vein, Imants, Slegers, and Witziers (2001) examined the effects of restructuring in Dutch secondary schools on the working contexts for teacher learning. They found that the connections between teacher teams and schools were less apparent. They argued that, instead of viewing school cultures as consistent, integrated monolithic entities, they needed to be viewed as multilevel, ambiguous, and multipurpose structures. These findings are consistent with the view of Martin (1992, 2002), who argues that cultures are complex, consisting simultaneously of consistent, inconsistent, and ambiguous interpretations. She argues that a wider range of insights can be gained by examining cultures from three theoretical perspectives: integrated, differentiated, and fragmented.

Several studies in the literature relate tensions to cultural conflicts (e.g., Busher & Harris, 1999; Datnow & Castellano, 2001; K. Ryan, 2002; Walker & Quong, 1998). Ryan, for example, examined tensions embedded in performance measurement systems that served public interests and oversimplified program quality. Her findings suggest the importance of developing evaluation systems that go beyond stakeholder opinions to gain a deeper understanding of the underlying values and relationships that structure them. Abrams and Gibbs (2000) also found that structural barriers embedded within different cultures prevented parental access to schools. Specifically, they found that structural barriers prevented equitable access to parents

who required child care, home visits, translators, and convenient meeting times. In a similar vein, Walker and Quong found that pressures toward conformity undermined the ability of school leaders to respond effectively to diversity. Their findings revealed that tensions rooted in various phenomena ranging from global movements to personal beliefs and organizational norms ingrained over time were evident in the lives of school leaders. They speculated that strategies such as recognizing, valuing, and learning from diverse values might help leaders shape successful learning communities.

Tensions related to changes in roles and responsibilities are common themes in the literature (e.g., Datnow & Castellano, 2001). Abrams and Gibbs (2000), for example, explored how collaborative reform efforts influenced role changes. Their findings showed that various new tasks were associated with increasing parental involvement and that shared decision-making and joint planning forced role boundaries to expand. The authors concluded that successful collaboration required resource support and time to understand the various effects related to the altered dimensions of change.

A second way of exploring role tensions is evident in Datnow and Castellano's (2001) investigation into the role of teacher leader in a whole-school reform initiative. The *Success For All* (SFA) reform model organized resources to ensure the reading success of elementary students. Although the SFA reform delineated clear role definitions for the principal's involvement, ambiguities emerged for others as the process expanded. Similarly, the role of the facilitator (i.e., the teacher leader) was clearly defined as mentor in supporting teachers, but considerable

tensions emerged as the process evolved. The effects of role ambiguity placed facilitators in the middle of school politics. The quasi-administrative role of the facilitator raised questions about authority when dealing with teachers as well as their relationship with the principal. They found that ambiguities created relationship tensions that had to be negotiated, which provides strong support for understanding the individual and internal effects that school reforms have on existing roles and responsibilities.

Personal

Ethical tensions among teachers pose threats to collaboration and open collegial relations. Using qualitative data from elementary and secondary school teachers, Campbell (2005) found that teacher' beliefs about collective solidarity, loyalty, and noninterference in a peer's conduct had a powerful influence on moral agency. She found that the norm of collegial loyalty served to close down collective and reflective dialogue rather than enhance it. She argued that ethical knowledge, exemplary of virtue-based professional practice, was not something teachers generally discussed together. Campbell speculated that ethical knowledge expressed in professional communities could connect core ethical principles to practice.

In their study of student teachers, Smagorinsky, Cook, Moore, Jackson, and Fry (2004) explored different conceptions of teaching expectations. The strength of this study was its use of activity theory, a social theory that expanded the analytic scope of understanding how early-career teachers formed particular beliefs about teaching and learning. The authors observed that student teachers experienced tensions related to differing ideals between the school and the university setting. They

concluded that, although relational tensions were productive, those that required a socially contextualized intellectual resolution were potentially more productive and conducive to formation of a satisfying identity.

Similarly, McNess et al. (2003) found that increased accountability placed greater demands on teachers while limiting time and space for maintaining a satisfying approach to pedagogy. These demands created daily dilemmas in professional practice that undermined confidence and self-esteem, all of which had an “adverse effect on teacher morale” (p. 255). Similarly, T. Fitzgerald et al. (2003) found that bureaucratic approaches to teacher appraisal resulted in tension and anxiety for teachers and administrators, which influenced self-efficacy and public perception of their practice.

Philosophical diversity linked to personal tensions is related to the role and purpose of education. In her study, Campbell (1996) found that teachers experienced tensions from differences in beliefs about practice. Rifts emerged from tensions that focused on the relative value of curricular components, emphasis of academic and social service, increased amount of accountability, and the equity-excellence duality. Campbell argued that some tensions were irresolvable but yet were valuable contributions to understanding the roles, responsibilities, and purposes of secondary education. In a similar vein, Fenwick (2001) argues that policies create either positive change or oppression merely through ignoring the multiple dynamics that influenced the daily enactment of a new initiative. She contends that teachers and administrators have agency to determine how policy might translate into the complex context of practice.

These findings are consistent with the results of McNess et al. (2003), who examined the effect of reforms on classroom teachers. In their study, using data from English primary and secondary teachers, they found that accountability added work demands, reduced time and space, increased dissatisfaction with pedagogy, and added daily dilemmas about professional practice. They concluded that recognition needs to be given to the learning context and the degree to which learners and teachers perceive their roles as active rather than passive.

In their study of 90 primary school teachers (80% midcareer to late career) in England, Woods and Jeffrey (2002) examined the impact of school inspections on teacher identity. They found that teachers reconstructed their identities in response to the reconstruction of the education system. They argued that the reconstruction of the educational system assigned a social identity that challenged the Plowden self-identity (social and personal identity and self-concept were at one) of teachers. Giddens (1991) defined the Plowden self-identity as “teachers who have a strong sense of ontological security and an almost taken-for-granted protective cocoon that stands guard over the self in its dealing with everyday reality” (p. 3). The study findings revealed four dilemmas facing teachers: (a) fragmentation to retain old values while pressured to adopt a new persona, (b) teacher autonomy in the face of feeling powerlessness, (c) constant uncertainty, and (d) commodification replacing personalized experiences. The results showed that teachers revealed signs of multiple and situational identities that were not evident before reform efforts.

The educational literature has dominantly focused on the negative effects of tension. The intent and purpose of educational reform has been to improve the

education system, although the subsequent tensions have affected the daily practice of teachers and administrators. This review identified three main themes related to tensions: (a) external tensions (external control), (b) internal tensions (external and internal control), and (c) personal tensions (individual and internal control). Tensions within these domains have focused narrowly on the content of reform and the intended outcome of implementation while neglecting the meanings that prevail for teachers and administrators.

Responses to Change

Research related to responses to change has begun to accumulate in the educational literature. These responses range from resistance, burnout, adaptation, collaboration, and appreciative inquiry to a continuum of responses. The majority of studies view response behaviours in singular terms in the sense that people are positioned as responding to change either one way or another. Specifically, in the educational literature, responses to change focus on engagement or resistance as primary factors for success or failure of reform efforts. However, a few studies have shown that people respond to change in variable ways. These studies pointed to the importance of understanding the meaning, complexity, and value of various responses to change.

Resistance

Studies of planned change in education have considered teacher resistance a barrier to innovation (Giaguinta, 1973). This perspective, rooted in a social psychological tradition, has advanced the view that teachers are conservative and unwilling to change without considerable enticement (Lortie, 1975). As such,

participation has been viewed as a strategy to overcome resistance, but evidence regarding its success is mixed.

Using qualitative data from teachers, administrators, and students of three secondary schools, Corbett et al. (1987) found that conceptions of school life were inseparably tied to professional identity, which ultimately led to teacher conservatism. Their findings showed that any initiatives that attacked their professional purpose, undermined their identity, or threatened who they were as teachers would be resisted. The authors positioned teachers' responses to identity threats as aversive behaviour, partially compliant behaviour, or irrational behaviour, but they did not view the resistance as an expected response to new norms that were in conflict with previously internalized sacred norms. These findings suggest that there is an important place for understanding the assumptive norms and purpose of professional identities as they relate to resistance.

One interesting line of study investigated the development of personal cover stories through narrative tensions. Olson and Craig (2005) examined how teacher knowledge was entangled with representational knowledge in forming cover stories. They found that cover stories, initiated and perpetuated through silence, compliance, moral imperatives, power structures, and normalizing forces, represented various ways of coping with stress. The authors also shed light on tensions between collegiality and congeniality, with the latter being an approach used by teachers to smooth over differences and live together in contradictory, tension-filled situations. These findings suggest that open, public spaces that brought all stories forward might encourage healthier, more instructive ways to enhance reflective practice. These

results also reinforce the importance of understanding narrative knowledge that individual teachers and groups of teachers hold and express.

This line of research is consistent with Elmore's (1987) approach to examining the concept of *authority*, which he defines as the intersection point between policy and pedagogy, to understand the roots of resistance towards reform or inertia in schools. He found that, when teachers were not seen as producers of knowledge, their claim to legitimate authority was undermined. He argued that disrespectful and dismissive treatment towards teachers contributed to their resistance to change. He speculated that successful reforms, ones that altered modes of practice, placed authority on the conditions of teaching and learning.

In their study of women teachers, Hubbard and Datnow (2000) examined educational reform from a gendered perspective. Using qualitative data of secondary educators from 10 U.S. high schools, they found that, when the character of reform took on a female-orientated identity, it ran the risk of facing resistance from men. The findings showed that gendered impressions can create negative sentiments, particularly by men, which limits the positive effects of the program. In their study, resistance was expressed in aggressive terms with an attack on the efforts of the women teachers involved in reform efforts. The authors concluded that gender operated as a system of power relations that influenced the success of change. Their findings suggest a need to inquire into the ways that gender socialization and gender relations affect resistance.

In their study, Goodson et al. (2006) found that teacher resistance was linked to historical experiences shared by a cohort of teachers who entered the profession at

a particular point in time. Their data showed that resistance related equally to generation and to degeneration. They defined generation as the construction, protection, and reconstruction of professional life missions and degeneration as deconstruction of physical capabilities and professional commitments. They hypothesize that teacher resistance is connected to social loss rooted in memories of schools as a family and to political loss rooted in memories of professional autonomy. They contend that loss of teacher autonomy has fostered a retreat from political engagement and a rise in personal disillusionment. They conclude that resistance is a complex phenomenon that can be better understood in the context of collegial learning partnerships and that can be ameliorated with changes that have beneficial implications for teaching and learning.

The emotional complexity of school change has recently received some interest in the educational change literature. Sachs and Blackmore (1998), for example, examined the impact of restructuring on the emotional labour of women leaders. They drew on the experiences of women leaders of primary and secondary schools in Australia during a period of education reform and school restructuring. Their findings showed that women in leadership positions employed a code of unwritten rules that circumscribed their actions in public arenas and internalized their corporate identities. These findings suggest that the complexity of emotional labour and the demands of emotional work placed upon women in leadership positions are high. Their conclusions pose questions that encourage researchers to focus attention in the area of emotions and emotional management within schools during periods of restructuring and change.

These findings are consistent with Blackmore (2004), who explored how school leaders mediated the emotional work of teaching and leading. She argued that emotions were forms of both resistance and transformation in the sense that displays of anger, frustration, and guilt were reflections of teachers' inability to do what they felt was educationally best for students. These findings position resistance in physiological, emotional, and intellectual terms and demonstrate that emotions such as alienation, loss of trust, and cynicism represent a fundamental human response to changes that are perceived to be unwelcome or unwise.

In her study, Blackmore (2004) also found a number of oppositional tensions between performance and passion. She found that, when performance concerns overtook passion, there emerged increased compliance, decreased creativity, increased use of silencing through authority, increased dependence on leaders, and decreased trust. Blackmore speculated that leaders needed to pay attention to and build social trust and social capital if they wanted to create a positive emotional economy of collaboration. These findings are consistent with Hargreaves's (1998) argument that the emotional nature of teaching is inseparable from the moral purposes of teaching and teachers' ability to achieve those purposes. Together these findings reinforce the importance of enhancing the emotional agenda of educational reform.

Burnout

Freudenberger introduced the term *burnout* in 1974 to describe the inability of an individual to function effectively at work due to prolonged or extensive job-related stress. From a psychological perspective, burnout is viewed as malaise related to three distinct but loosely coupled dimensions: emotional exhaustion (feeling emotionally

overextended with one's work), depersonalization (development of negative and uncaring attitudes towards others), and negative personal accomplishments (loss of feeling self-competent and satisfied with one's achievements; (Bryne, 1991). Pines (1993) referred to burnout as an existential crisis linked to self-image and to devalued self-worth. In general, psychologists view burnout as an inability to cope with stressors, whereas sociologists conceptualize burnout as a form of alienation that involves powerlessness, meaninglessness, normlessness, isolation, and estrangement.

In his study of 3,165 teachers, Dworkin (2001) incorporated all five elements of alienation into his definition of burnout to examine the role of legislated school reform on teacher burnout. Using data from a single Texas school district collected during each of three waves of reform (1987, 1991, and 1998), Dworkin compared the prereform data from 1983 to the postreform findings. His analysis revealed that teachers learned to cope with reforms by ignoring them and that the relationship between stress and burnout had become recursive. The greater the level of stress, the greater the level of burnout, but once burnout reached a high level, it had less effect on stress. He argued that burnout was a coping mechanism that teachers employed when they ceased to care, thereby having a positive effect on stress. He found that demographics of teachers with high levels of burnout changed across waves of reform and speculated that burnout may be situational and contextual. These findings reinforce the notion that teacher burnout is not necessarily a permanent condition and that, as working conditions change, individuals can develop coping skills that dissipate burnout.

Using qualitative data of 160 high school teachers, Huberman (1993) compared how teachers of differing length of experience viewed their working life. He found that most teachers encountered periods of self-doubt and disenchantment, and their decisions about leaving or staying in the profession were influenced by their reassessment as to whether their original concerns had been resolved. He reported that fatigue, nervous tension, frustration, wear and tear, difficulty adapting, personal fragility, and routine were the most common motives for leaving. The notion of wear and tear is reminiscent of Kryriacou's (2001) study that shows prolonged stress leading to teacher burnout.

Stress-related burnout created by pressures and anxieties of the daily dilemmas of teaching can result in job dissatisfaction and poor morale (Kyriacou, 2001; Sheesley, 2001). Chaplain (2001), for example, studied stress and job satisfaction among a sample of headteachers at 36 schools in the U.K. The survey questionnaire found four main themes related to stress: (a) external factors (e.g., legislation, governors, inspections); (b) school structures (e.g., maintaining standards and budgets); (c) interpersonal processes (e.g., relationships with teachers and parents); and (d) personal factors (e.g., professional activities and lifestyle). The findings showed that 55% of the respondents experienced very high levels of stress on a regular basis. Further analysis of this group revealed that 33% reported extreme or high levels of stress but still felt very satisfied with their work. The remaining 22% reported they had regularly high levels of stress and were generally not satisfied with their work. Chaplain concluded that stress related to the cultural milieu of schools

varied with coping and that a balance between stressors and resources was a central feature of the coping process.

Teacher burnout has often focused on stress in terms of teacher personality. A second perspective links burnout to structural and work characteristics. In his study, Dorman (2003) found that role overload, work pressures, classroom environment, and self-esteem were all predictors of emotional exhaustion. The strength of this study was the use of the standardized Maslach Burnout Inventory instrument with 246 subjects. The findings reported that depersonalization (development of negative and uncaring attitudes towards others) significantly related to emotional exhaustion, role conflict, self-esteem, and the school environment. Teaching efficacy, self-esteem, and depersonalization were also predictors of personal accomplishment. These findings are important because they demonstrate that both organizational variables and personality factors of individual teachers influence burnout.

Adapting Identity

A fundamental understanding of social construction theory is that teachers reconstruct their identities in response to reconstructions of the educational system. Woods and Jeffrey (2002), for example, argue that the current market mentality in education assigns to teachers a new social identity that challenges the holism, humanistic, and vocational components of the traditional integrated self-identity. Their study revealed that, in a market-driven environment, teachers had to work harder to negotiate a degree of consistency between their self-concept and the assigned social identity. Two major patterns of response were found: (a) self-positioning (refusal to embrace new social identity) and (b) self-asserting

(dismemberment of old self-identity and replacement with a more fragmented one). To separate themselves from the newly assigned social identities, teachers used such strategies as self-displacement (dissipate harmful effects of incongruity), game playing (act out new assigned social identities), and realignment (recognize that self-identity is fragmented). These results provide strong support for exploring the connections between social identities and responses to tension.

Outside the educational literature, writers use sensemaking as an analytic approach to understand tension as a positive force relating to strategic change (Eddy, 2003; Ericson, 2001; Gioia et al., 1994; Weick, 1995). Ericson, for example, used longitudinal data to examine strategic change at a large hospital in Sweden. He generated a conceptual framework that reflected how individuals created meanings and made sense of their organizational experiences. He found four core meanings related to the strategic change process: (a) collective meanings (cognitive scheme of individuals exhibit the same characteristics), (b) disparate meanings (cognitive profile of the group is heterogeneous), (c) fragmented meanings (cognitive scheme of individuals is heterogeneous), and (d) enclave meanings (cognitive scheme of individuals is homogeneous). These results imply that meanings change over time and that a sensemaking perspective makes the complexities of change more visible.

Collaboration

A dominant theme in the school change literature is the issue of collaboration. Gitlin and Margonis (1995) note that engagement through collaboration is expected to enable teacher commitment and motivation. First wave educational change researchers believed that psychological characteristics hindered engagement, whereas

second wave researchers relied on cultural perspectives. Second wave researchers saw collaboration as a means to diminish isolation and alienation and thereby to engage teachers more effectively with reform. To promote mutual learning, engagement, and reflection, change strategies employ common approaches of collaboration. Hargreaves (1995) argues that collaboration is critical for teachers to gain more confidence and less uncertainty about classroom practices and each other. Collaboration, learning, and strong healthy cultures are seen as supportive mechanisms for growth and development (Fullan, 1999).

Several studies point to collaboration as a positive response to imposed change in schools. Using life story data from interviews with 5 women teachers, Oplatka (2005) examined the relationship between mandated change and self-renewal. The author used a self-renewal model containing five elements: (a) internal reflection, (b) reframing existing perspectives, (c) searching for new opportunities and task, (d) enthusiasm and replenishment of internal energy, and (e) professional updating. She found that teachers' accounts lacked expressions of negative emotions and did not contain internal reflections, nor did they reframe existing perspectives. He concluded that biographical characteristics such as emotional commitment were connected to self-renewal. These findings place importance on the need to explore positive emotional responses to educational change.

West, Ainscow, and Stanford (2005) investigated how 34 low-performing secondary schools were transformed. Using qualitative data of 44 head teachers, they found four successful interrelated strategies: (a) changing the culture of the school, (b) focusing on teaching and learning, (c) reviewing the school day, and (d) using

data purposefully. Of particular note, they found that initial momentum and self-belief among staff and pupils were the most difficult steps of the process. Their findings showed that performance solutions were individual and context specific, which emphasizes the need to examine how change decisions affect other school priorities.

Smyth, McInerney, and Hattam (2003) undertook a 12-month ethnographic study to review the declining completion rates of high schools. To identify inequities and to understand the nature of rescripted relationships, they used a heuristic that encompassed school culture, teaching and learning, and school structures. Using qualitative data from 12 teachers, co-ordinators, and principals and 16 students, they found that reform in middle schools related to the formation of a different type of teacher who undid the institutionalization of teacher-student relationship demanded by reforms. The authors concluded that issues related to institutional scripts were complex, and they speculated that breaking the mold of scripted teacher and reconstructing a professional identity of teacher-as-improviser could invite students into script making.

Using survey data from 1,435 Norwegian teachers in 47 municipalities, Midthassel (2004) examined the associations between teacher involvement in school development activity (SDA) and teachers' attitudes towards SDA as well as the perceived working conditions concerning innovation activity among staff and the principal. A methodological limitation concerned the timeliness of surveys which were conducted during the first year of the new reform when higher involvement was expected. The author found that teachers who perceived involvement in SDA as

meaningful were more likely to perceive the norms among staff to be change oriented. The findings also showed that teachers on average felt that involvement in SDA was a relevant task, but it was perceived to be more relevant among elementary school teachers than among junior high school teachers. In line with the study assumption, the findings also showed that the principal's involvement as perceived by teachers was positively associated with the teacher's own involvement. The findings reinforce the importance of teachers' perceptions at all levels of the process and all levels of the organization.

Drawing on extended evaluation data of Woolwich Reach and Plumstead Pathfinder Action Zones (WRaPP) that involved 17 primary, secondary, and nursery schools in England, Riley and Jordan (2004) provided evidence of success in generating trust, unleashing energy, generating creativity, and engaging school personnel and students. The authors argued that the capacity-building model at the heart of the initiative built opportunities for staff to work together in problem-solving activities that enhanced their understanding of the process. The authors found that teachers needed time to experiment, reflect, and conceptualize as a group, not just as individuals. These findings demonstrate the importance of time and space for experimentation through change.

Similar conclusions were reached using international comparative data from three school improvement projects: the Improving the Quality of Education For All Project (IQEA) in England, the Manitoba School Improvement Project (MSIP) in Canada, and the Success For All (SFA) schools in the United States. Harris (2003) explored the relationship between organizational and pedagogical change. He found

that changing organizational arrangements and building an infrastructure to support collaboration fostered mutual professional learning. These findings reinforce the positive connection between collegial relationships and enquiry-oriented practice.

Collaborative enquiry was a central vehicle for professional learning that raised standards of achievement at the Hartlepool Networked Learning Community (HNLC; Holmes, 2004). Using data from 72 teachers from 13 schools, Holmes found that aligning school priorities, structures, resources, and flexibility were necessary supports for successful enquiry. Similarly, Barab, Barnett, and Squire (2002) examined community learning within a community-based teacher-education program. Using tensions (dualities) as an interpretative lens to understand patterns of community life, they argued that the dynamic interactions that characterized community activity were stimulated in part by the commitment to embrace as opposed to remove emergent tensions. Their findings support the use of activity theory to examine community dynamics and to understand the tensions within professional learning initiatives.

Appreciative Inquiry

Innovative processes to advance organizational development have used an appreciative inquiry approach to improvement. Appreciative inquiry as an organizational intervention reflects principles drawn from theory and research in human and social sciences (Srivastva & Cooperrider, 1990). Appreciative inquiry (AI) focuses attention on dialogue and learning and offers affirmative processes for organizational development and change. Appreciative inquiry acknowledges the connectedness of life and provides for relationally generated meaning and practice

that yield affirmative processes for organizational development and change (Whitney, 1998).

Appreciative inquiry's historical roots go back to Kurt Lewin's action research. Cooperrider and Srivastva (1987) claim that action research's transformative potential has been constrained by a problem-oriented view. They argue for an affirmative view, which is at the heart of appreciative inquiry. Social constructionism underpins the five principles central to appreciative inquiry: (a) constructionist principle (knowing is central to change); (b) poetic principle (past, presents, or futures are sources of learning); (c) simultaneity (inquiry and change are inseparable as organizations are living systems); (d) anticipatory principle (future is a catalyst for change); and (e) positive principle (social affect and social bonding build and sustain change; S.P. Fitzgerald, Murrell, & Miller, 2003).

Appreciative inquiry has been applied most frequently to individuals, families, and organizations that range from global organizing, corporate culture change, team building, and leadership development. However, research using an appreciative inquiry framework has generally been slow to develop in the educational literature. A recent exception to this was a qualitative study that embedded the principles of appreciative inquiry principles into the research framework. Andrews and Lewis (2004) drew on their experiences in Australian schools that were engaged in a whole-school reform known as Innovative Design for Enhancing Achievement in Schools (IDEAS), in which educators were charged with the task of building their school of the future. The authors used a conceptual framework that placed pedagogy and alignment at the centre of the learning environment design. They argued that capacity

and identity were enhanced when integration and depth occurred across five elements of the school as an organization: (a) strategic foundations, (b) cohesive community, (c) infrastructure design, (d) school-wide pedagogy, and (e) professional learning. These findings provide evidence for understanding the processes that encourage professional conversations, engagement, and personal reflection, all of which are elements of appreciative inquiry.

A qualitative research approach based upon the concept of appreciative inquiry examined students' views of learning. Using data from 58 young people at four schools in England, Carnell (2005) found that three models of learning emerged: (a) instruction (taught), (b) construction (individual sense making), and (c) coconstruction (building knowledge with others). Her findings revealed that effective learning included activity in learning, learner responsibility, and collaboration. Her findings also found that available time to talk about learning was limited in all four schools. These findings place importance on appreciative inquiry as an approach of enquiry.

Consistent with the ideals of appreciative inquiry, O'Hara (2006) has challenged the foundational assumptions of educational systems in a postindustrial information age of rapid change and complexity. She argues that the mental capacities that generate success in an industrialized world, such as objectivity, reason, rational linear logic, and certainty, must unfold within a new worldview of uncertainty. She contends that a new context of complexity and uncertainty calls for cultivation of levels of unconsciousness and habits of mind that go beyond rational thought. She believes that educational institutions need to rethink four holistic and

interrelated dimensions: (a) new broader mission, (b) new curriculum content, (c) new pedagogy, and (d) new modes of inquiry. She speculates that supporting structures in education exist in the creative tension between unanswered questions and emergent problems, which offers the possibility of reclaiming capacities and moving beyond existing forms of knowledge (Peat, 2005). Similarly, McWhinney and Markos (2003) argue that educational institutions have not kept pace with technological innovations, lengthening life spans, or ongoing reeducation to reinvigorate lives. These authors distinguish between transformative learning and transformative education. They conceptualize transformative education, from an appreciative perspective that illuminates death and rebirth, as a framework for growth and development. They suggest that engagement of a cross-disciplinary dialogue that informs practice across personal, productive, instrumental, emancipatory, and holistic goals would build educational sustainability.

A Continuum of Responses

Beach and Pearson (1998) examined changes in preservice teachers' perceptions of tensions and their strategies for coping. Using a sample of 28 students from a 15-month baccalaureate program, they found tensions related to curriculum and instruction, interpersonal relationships, self-concept or role, and institutional contexts. The findings showed three levels of response strategies: (a) Level I, avoidance/denial, (b) Level II, short-term temporary relief, and (c) Level III, long-term strategies that interrogated perceptions and personal theories. The strength of this study was its large sample size and its focus on student teachers who are at the beginning stages of interrogating their competing theories of teaching and learning.

These results suggest that preservice teachers need encouragement and assistance in defining, explaining, and grappling with tensions for growth and change. The authors concluded that safe, collaborative, supportive contexts would enable preservice teachers to engage more easily in guided self-reflection.

Moore, Edwards, Halpin, and George (2002) drew on empirical data of 72 primary and secondary teachers to explore the ways in which the teachers repositioned themselves in the face of educational change. The authors argued that local responses prompted teachers to become increasingly pragmatic in their practice. The authors defined two distinct forms of pragmatism: principled pragmatism and contingent pragmatism. Principled pragmatism referred to positive responses that affirmed pedagogical identities and drew on a range of educational practices and traditions, whereas contingent pragmatism referred to oppositional orientations that reflected survival strategies. The authors suggest that the adoption of a pragmatic stance reflected coping strategies and that pragmatic stances in themselves are oppositional and lead to professional depoliticization in the sense that oppositional stances were replaced by politics of compromise. These findings suggest a need for further investigation about the complexity of pragmatism as it relates to resistance.

A *new orthodoxy* (Hargreaves, Earl, Moore, & Manning, 2001) has redefined the work of teachers and school leaders and has forced unintended consequences. To discover the unintended consequences that change forces have on teachers and principals, Fink (2003) examined context, identity, leadership, structure, culture, and the work of teachers in one Ontario secondary school. Using data from the longitudinal *Change Over Time* study, his findings revealed that changing political

forces had influenced beginners, potential retirees, and midcareer teachers in significant ways. The findings showed that beginners struggled with classroom organization, discipline, and pressures of competing demands. Potential retirees were compliant with changes but found they diminished from previous standards while they acknowledged the intensification of work and compression of time. Although stressed with workload and fewer resources, midcareer teachers physically and emotionally withdrew their commitment to teaching. These findings provide strong evidence for sociocultural examinations of teachers' and administrators' disengagement strategies.

Positive Response

The literature outside of the educational change knowledge base has identified activity theory and sensemaking as methods that treat tensions as positive forces for change. A number of studies have used activity theory as a method to characterize the tensions in organizations undergoing change in order to better understand the dynamics of negotiating them. Engeström (1999) contended that understanding a system through its tensions was a useful way to understand the factors that fueled change and innovation within that community. In the educational change literature, several researchers found that identifying tensions from an activity system perspective was an important approach to bringing about change (e.g., Daniels & Cole, 2002; Engeström, 2000; Hay & Barab, 2001). Similarly, others have used tensions to characterize communities of teachers and to understand the interactions that lead to learning (e.g., Barab, Barnett & Squire, 2002; Roth & Tobin, 2002).

In one example, Barab, Barnett, and Squire (2002) used activity theory to characterize tensions of a teacher preparation program, Community of Teachers (C of T), whose core goal was to foster community among members. The aim of their study was to understand four interrelated domains comprising the community life of teachers: ecology (context); social organization (structures); cosmology (beliefs, knowledge, and skills); and developmental cycle (community configurations and reconfigurations). They found that four core tensions characterized the community: (a) instructor as facilitator and gatekeeper, (b) learning theory and doing practice, (c) portfolio as supporting reflection and as accountability device, and (d) stability and change. The researchers concluded that the dynamic interactions that characterized the C of T activity were stimulated by the facilitators' commitment to embrace, as opposed to remove, emergent tensions because the tensions frequently led to learning. These results lend support for using activity theory as a way to illuminate tensions to understand the contradictions within communities of learning.

Similarly, Roth and Tobin (2002) used activity theory to analyze tensions in an urban teacher education program. The aim of their study focused on the redesign of an urban teacher education program from a traditional to a co/teaching-dialoguing model. The researchers' findings revealed a number of contradictions that interfered with students' ability to increase their knowledge. For example, students were aware that new teachers were temporary roles, which often resulted in unruly and disrespectful behaviours and led to students resisting and subsequently learning less. Although tensions occurred between student teacher and student knowledge acquisition, results also showed contradictions on other levels of activity, such as

institutional and interpersonal philosophical conflicts between the school and the university concerning expected learner outcomes. The researchers nevertheless concluded that tensions provided opportunities for reflection and analysis that encouraged positive aspects of change.

The usefulness of using methods such as activity theory and sensemaking for the study of tension can be justified on several grounds. First, they provide a means to generate concepts relevant to the analysis of whole collectives such as organizations or groups. Both methods bridge between the individual and the collective levels, which adds an important element to the study of tension. Strategic change processes expose meanings to reconstruction where individual beliefs are challenged. Accordingly, to understand tension related to organizational change, it is necessary to understand the subjective meanings as well as the processes by which these meanings shift and coincide (Ericson, 2001).

In summary, the educational change literature describes tensions as responses to change. These studies frame responses as negative or positive but largely focus on tension as a negative response. Although positive responses to tension have been undertheorized, a few studies have applied methods that illuminate the dynamics that fuel innovation and growth. These studies reinforce the importance of using such methods as activity theory and sensemaking to understand the complexities of change and the meaning individuals ascribe to it as a way to advance learning and development. Despite the limited attention in the education change literature to the study of tension as a positive force, several researchers parenthetically acknowledge a need to understand tension as a contributor to the ongoing development and purpose

of education. It is somewhat surprising that positive responses to tension or stress are almost silent in the educational reform literature, since the psychology literature has long recognized the positive effects of stress that act as motivational forces in terms of performance. The implication of this absence is not known as yet but is of implicit importance.

Although a few studies provide important insights into the subjective experiences of tension, additional efforts are needed to enrich this understanding. A better understanding is needed to understand the dual nature of tension, which may serve as building blocks for understanding the ways that school personnel interpret and adapt to change. Given the gap in knowledge about teachers' and administrators' experiences of tension due to the almost complete absence of exploratory research specifically about their experiences, research is needed to develop in a systematic manner a foundation of basic knowledge about their experiences. The present study sought to build on theoretical and empirical literature in two ways: first, by exploring how teachers and administrators make sense of tension and second, by developing a grounded theory about tension.

Research Question

Accordingly, the purpose of this research study was to develop a conceptual framework to increase understandings of how teachers and administrators make sense of and accommodate tensions related to change. To accomplish this investigation, a qualitative case study using grounded theory methods was employed.

CHAPTER THREE: RESEARCH DESIGN AND METHODOLOGY

Tension is present as an ongoing reality of change in the education system. Confronting these tensions places school personnel in situations where they must continually respond in order to make sense of their day-to-day realities. Thus far, the negative responses to tension have dominated the research agenda as attention has focused on stress related to teacher burnout, job dissatisfaction, and poor morale. By contrast, the positive responses to tension or the ways that tension is useful have rarely been addressed in the literature and remain undertheorized. Consequently, there is a need to develop an in-depth understanding of teachers' and administrators' experience of tension. To address this gap, this study sought to understand how teachers and administrators in one elementary school made sense of the dual nature of tension.

The purpose of this chapter is to present the research design and methodology employed to achieve this research agenda. The chapter provides justification and explication for the qualitative study and outlines the various components of the research design related to the theoretical approach, data collection, and data analysis, all of which combine to form a process consistent with the underlying philosophy of the study. Accordingly, the chapter consists of five main sections: (a) research design, (b) phases of the study, (c) methodology, (d) data analysis, and (e) ethical considerations.

Research Design

The absence of any theoretical or empirical work on teachers' and administrators' experience of tension required an in-depth exploration. Therefore, this

study is constructivist and interpretative in nature and has been designed to learn as much as possible about the experience and meaning that school personnel ascribe to tension.

This section of the chapter outlines the research design with respect to the theoretical orientation, grounded theory approach, preliminary descriptive framework, and the case study method. As well, given the interpretative nature of this study and the importance of the role of the researcher as a primary instrument of data collection and analysis (Lincoln & Guba, 1985), researcher interests are acknowledged.

Theoretical Orientation

The constructive interpretative approach underlying this research study is shaped by both the theoretical orientation of the researcher and the nature of the inquiry (Merriam, 1988). Interpretative research is guided by a set of beliefs that is based on the social construction of reality. “Constructivism assumes the relativism of multiple social realities, recognizes the mutual creation of knowledge by the viewer and the viewed, and aims toward interpretative understanding of subjects’ meaning” (Charmaz, 2000, p. 510). A constructivist approach validates studying individuals in their natural settings by “attempting to make sense of or interpret phenomena in terms of the meanings people bring to them” (Denzin & Lincoln, 2000, p. 3). An interpretative researcher acknowledges the complexity inherent in a phenomenon and attempts to deal with it in a holistic way.

An interpretative approach provides three important benefits to the study of tension. First, an interpretative, grounded approach facilitates the exploration of how people make sense of the everyday realities of tension and the meaning they ascribe

to it. Second, an interpretative study emphasizes a holistic view and uses a variety of empirical materials that are consistent with understanding the complexity of such a topic as tension. Third, little attention has been given to the “social contradictions” (Sjoberg, Williams, Vaughan & Sjoberg, 1991, p. 53) people experience in the course of their everyday lives. It is therefore necessary to observe people in their natural settings in order to understand how they cope with and even use contradictions in creative ways.

Grounded Theory

Given the absence of any theoretical or empirical work on teachers’ and administrators’ experience of tension, a qualitative methodology for knowledge building was necessary. This study was designed to learn as much as possible about the way elementary school teachers and administrators perceived tension to affect their work activity, their interpretations and experiences of change, and their ability to negotiate change. As such, a flexible research design was developed to adapt to the need for various data sources and to gather insights and concepts related to an emerging understanding of tension (Taylor & Bogdan, 1998). This inductive process helped in remaining close to the empirical setting in order to develop an integrated set of theoretical concepts (Charmaz, 2005). Taylor and Bogdan concur that,

by observing people in their every day lives, listening to them talk about what is on their minds, and looking at the documents they produce, the qualitative researcher obtains firsthand knowledge of social life unfiltered through operational definitions or rating scales. (p. 9)

This exploratory study used a grounded theory approach to understand the concept of tension (Charmaz, 2000, 2006; Glaser & Strauss, 1967; Strauss & Corbin, 1990). Grounded theory is considered a “style of doing qualitative analysis” (Strauss, 1987, p. 5) that includes specific techniques. Primarily, these methods consist of “systemic inductive guidelines” for sampling, collecting, and analyzing data to ensure theoretical development (Charmaz, 2000, p. 509). The continuous interplay of data gathering, data analysis, and purposeful selection of participants who are able to develop the theory is an essential feature of the approach. The centerpiece of grounded theory research is the development of a substantive theory that seeks to understand the relations among concepts and sets of concepts. This often results in the form of a series of “propositions or in a running theoretical discussion” (Glaser & Strauss, p. 31).

Descriptive Framework

A preliminary descriptive framework was developed from the literature to provide for a point of entry into the study. Glaser and Strauss (1967) believe that researchers may begin “the research with a partial framework of ‘local’ concepts, designating a few principal or gross features of the structure and processes in the situations that they will study” and argue these initial ideas are not based on a “preconceived theoretical framework” (p. 45). Accordingly, in this study a preliminary framework provided a model of organizational dynamics in which to explore the concept of tension.

An earlier review of the educational reform literature provided sensitizing concepts that served as tentative tools for developing ideas about processes that might

be defined in the data. As such, the concept of tension was positioned as a duality, acting as both a positive and negative force (Barab, Barnett & Squire, 2002). Tension as a negative force is expressed in the literature as arising from philosophical differences (Campbell, 1996; McNess et al., 2003); structural barriers (Abrams & Gibbs, 2000; Fenwick, 2001); cultural conflicts (Datnow & Castellano, 2001; K. Ryan, 2002; Walker & Quong, 1998); and role and responsibility changes (Datnow & Castellano, 2000). Tension as a positive force is largely underrepresented in the literature, but when it was included, it was primarily viewed through a functional lens. For example, activity theory was used to identify tensions that fuel change and innovation (Daniels & Cole, 2002, Engestrom, 1999, 2000; Hay & Barab, 2001), while the sensemaking literature relates tension to strategic change (Ericson, 2001; Weick, 1995). Accordingly, negative and positive responses to tension were found in the literature, but negative responses dominated (e.g., teacher burnout (Kyriacou, 2001; Sheesley, 2001), stress and job dissatisfaction (Chaplain, 2001), and poor morale (T. Fitzgerald et al., 2003)), while positive responses to tension received limited attention in the education reform literature. To bring the two aspects of tension together in a preliminary framework, I blended the negative force of tension (e.g., philosophical, structural, and cultural) with the positive force of tension (tension as method) to develop the concept of tension as a duality. Accordingly, the descriptive framework emphasized interest in the negative (e.g., stress, burnout, self-esteem), while the positive responses to tension remained underdeveloped (i.e., communities of practice). These concepts represented points of departure for developing, rather than limiting, my ideas about tension.

This framework was not intended to represent a theory of tension but rather to capture more generally the relationships and interactions between individual, group, and context in which tension might occur. These initial concepts provided an early “foothold” on the research topic but did not represent any theoretical importance to tension (Glaser & Strauss, 1967, p. 45). Broadly conceived, this study was conducted to develop a theoretical framework of tension through exploration of the strategies that teachers and administrators used to make sense of tension as well to understand the factors that shaped and constrained these strategies and experiences. Thus, a grounded, multiperspective approach that involved the contextualization of social activities, cultural practices, and individual experiences was planned to gain a deeper understanding of tension and the linkages between tension and the actual “social world in which it is embedded and sustained or reproduced” (Denzin, 1989, p. 32). This descriptive framework therefore sketches the boundaries of the social system to be studied, not the actual situation, by describing points of access such as work activities, cultural practices, and individual experiences where teacher and administrator concepts of tension may be explored.

Case Study

Case studies offer a “complete description of a phenomenon within its context” (Yin, 2003, p. 5). In this study, the case under investigation was the experience and interpretation of tension. The case study is an appropriate vehicle for an exploratory investigation as it provides a solid empirical basis to develop new ideas and theoretical concepts (Feagin, Orum, & Sjoberg 1991). The case study offers several advantages for investigating teachers’ and administrators’ experience of

tension. First, the holistic approach of case studies lends itself to the study of various levels of social meaning while at the same time acquiring a sense of what drives individual motives (Feagin et al., p. 11). Accordingly, researchers who use case studies “can deal with the reality behind appearances, with contradictions and the dialectic nature of social life, as well as the whole that is more than the sum of its parts” (Sjoberg et al., 1991, p. 39). Second, this method enables the observer to examine the rhythm of social life over time to identify the significant interactions and patterns of everyday life as they change. Third, the heuristic nature of the case study facilitates the discovery of new ideas, interpretations, and relationships of the phenomenon.

Although the characteristics of case study methods offer advantages, various critiques must also be considered. First, for the case study to be multiperspective, triangulated, and oriented to the development of events and behaviours over time, it is a time-consuming and labour-intensive venture. Second, “its contextual embeddedness and its emergent design make the standardization of procedures across cases a complicated, if not impossible, task” (Snow & Anderson, 1991, p. 165). Third, most frequently cited is its presumed lack of generalizability. However, Patton (1990) offers a practical view of generalization and argues that qualitative research should “provide perspective rather than truth, empirical assessment of local decision makers’ theories of action rather than generation and verification of universal theories, and context bound explorations rather than generalizations” (in Merriam, 1998, p. 209). Patton (in Merriam, 1988) further suggests that qualitative research strives to

understand situations in their uniqueness as part of a particular context and the interactions there. This understanding is an end in itself, so that it is not attempting to predict what may happen in the future necessarily, but to understand the nature of that setting – what it means for participants to be in that setting, what their lives are like, what’s going on for them, what their meaning are, what the world looks like in that particular setting – and in the analysis to be able to communicate that faithfully to others who are interested in that setting.... The analysis strives for depth of understanding. (p. 17)

Accordingly, the research study designed a case study with an emergent design such that each phase of the study built upon the previous phase.

Researcher Interests

Geer (1964) suggests that the early days in the field represent the “transition from an artificial, isolated world of academic idea and thought to a cauldron of interacting human relations in the research field” (p. 323). This transition conveys a process where one must let go before grasping onto something new, an exchange of sorts. However, the experience of exchange is much more entangled because, as Fenwick (2003) argues, we selectively create our experiences from the words, cues, and points of view that we notice and highlight. The intimacy of the exchange means that values and beliefs of both participant and researcher must be revealed to discover new meaning. As a researcher, the experiences and reflections on my own subjectivity are “immediately accessible to me in a way that no one else’s are” (van Manen, 1997, p. 54), which makes them essential to acknowledge.

My motivation to study tension is fueled by a desire to understand more deeply the nature of the concept. My life growing up in a family business brought me close to the contradictions and conflicts of everyday life within and between people. As someone who avoided conflict, I quickly learned how to be resilient by working around or through tense situations. These experiences also helped me develop sensitivity to various nonverbal communication cues that are so often entangled in situations of conflict. The entanglement created a curiosity to understand the subtleties of tension and to explore the meaning of it and the context in which it exists.

Health care is the professional context upon which I draw to understand tension. I experienced and observed tension while working in long-term and tertiary-care health facilities during intense periods of downsizing. My role as an internal corporate development consultant was to work with both senior managers and front-line staff to help them transition through change. However, the tragedy of many of these experiences was that, while I attempted to motivate front-line staff, I found disconnections at the organizational level creating tensions that often left staff struggling to cope.

These experiences of organizational change suggested that overt institutional response was primarily structural. I detected little focus on the meaning of change for the people moving through it or the tension it created. As a result, I have a strong desire to make sense of tension and to understand how others feel it and move through it to make sense of a situation. This study is also motivated by my perception

of a deep dissonance across the rhetoric of change, the occurrence of organizational change, and the meaning of change for those involved.

I have a curiosity and commitment to understand more broadly the ontological and epistemological nature of tension. It is not so much from the perspective of seeking particular outcomes or proving something but rather to get below the surface of tension and to explore deeply the meaning of it for those experiencing it. My attempt to be aware of my bias, to bracket my own experiential knowledge, and to position myself as a researcher was aided by my outsider orientation as I conducted the study of tension in the education system rather than in the health care system.

Phases of the Study

The research was designed as a multiphased study to gather substantive and relevant data to answer the theoretical questions about tension. Phase one involved preliminary interviews with 8 randomly selected teachers and 2 school administrators. The purpose of this phase was to inquire about a disruptive experience that had created tension for participants. The intent of the inquiry was to simulate a sensemaking episode in order to explore the three empirical questions related to work activity, interpretations of change, and negotiations through change.

Phase two involved semi-structured interviews with 2 school board personnel and 2 school administrators. The purpose of this phase was to gather insights on the school and school district, perceptions of change and tension, and to understand the broad processes in which school personnel interacted.

Phase three was intended to explore the second empirical question: How do teachers and administrators perceive tension to affect their interpretation and

experiences of change? The purpose of this phase was to identify possible points of contradiction or tension between multiple interactions of work activity. Interactions between school norms, shared artifacts, hierarchical structure, and the practices that mediated between them were mapped to locate the points of tension in work activity.

Phase four was intended to explore the third empirical question: How do teachers and administrators perceive tension to shape or constrain their ability to negotiate tension? The purpose of this phase was to explore the sensemaking process of teachers and administrators as they experienced tension of change.

Research Setting

As an outsider to the school system, I considered purposeful selection of the school site, through advisor contact, to be the most successful way of gaining access to the school. The elementary school came to the attention of my advisor when she began a three-phase federally funded research project entitled *Building a School's Capacity as a Learning Community*, which she conducted jointly with two researchers from the University of Saskatchewan. That study was undertaken to investigate the factors that affect a school's ability to function as a learning community, broadly defined as a propensity in the school to "take an active, reflective, collaborative, learning-oriented, and growth-promoting approach toward the mysteries, problems, and perplexities of teaching and learning" (Mitchell & Sackney, 2000, p. 9).

For Phase One of the study, the researchers distributed questionnaires to all staff and selected students in nominated schools in Ontario and Saskatchewan. To find an appropriate sample of schools, the researchers distributed letters to each

Director of Education in the two provinces, asking them or the administrative team to nominate schools on the basis of five criteria:

1. Evidence of high energy and enthusiasm.
2. Evidence of high quality of instruction.
3. Evidence of a collaborative culture.
4. Evidence of innovation and continuing improvement.
5. Evidence of community involvement, both interagency and parental.

The school ultimately chosen for my study had been nominated by school board officials and had agreed to participate in the *Learning Community* research project. Forty questionnaires were sent to the school, with 18 being returned for data analysis. The questionnaires consisted of 55 forced-answer questions that asked participants to rate the school on a number of characteristics of a learning community and 5 open-ended questions that asked them to offer their thoughts about the character of the teaching and learning environment in their school.

Data analysis of the forced-response items yielded a profile of the school's levels of personal, interpersonal, and organizational capacity in comparison to the average levels derived from the cross-province sample. Analysis of the open-ended questions yielded a themed summary of concerns, issues, and strengths identified by the participating staff members in the school. The quantitative data analysis for the school suggested that there was considerable room for growth on the characteristics of a learning community. The qualitative data analysis indicated that the staff was somewhat divided in terms of their desire and preparation to build a more effective learning climate in the school but that there was a strong foundation of support,

encouragement, and interest to move forward. It also indicated that the strengths in the school were accompanied by several sources of tension. Upon completion of Phase One, the researcher met with the school staff to deliver the school results and to respond to questions or comments. That meeting confirmed that the sources of tension, although not felt by all staff members, continued to be of concern to at least some of the staff and continued to flavour collegial discussions and processes.

Gaining Access to the School

Gaining access to proceed with the research involved a formal application process and school board approval. A meeting was arranged with the Research Co-ordinator of the School Board District to review specific questions related to the school board application and to gather as much information about the formal process as would be helpful to ensure school board approval. During the meeting, expectations of the Research Advisory Committee were outlined, with specific attention to areas that were typically scrutinized, such as methodology, confidentiality, and member checking. Major research initiatives and pertinent issues of concern operating at the school board level were also discussed. Learning that the collective agreement for all elementary teachers had expired the previous summer was important information to obtain given the potential impact it might have on the process of research.

Subsequent to the meeting, a package of information about the study was assembled for each member of the Research Advisory Committee. On October 20, 2004, I attended the Research Advisory Committee meeting to facilitate the approval process. Conditional approval was granted on the basis that the following three

recommendations be added to the application: (a) member checking, (b) a third consent form to allow participants to separately agree to their transcripts to be used as data, and (c) an option to conduct interviews outside the school setting that provided for a place of neutrality. In addition to the formal recommendations, issues concerning the potential job action, parent and community curiosity of study, and the importance of the researcher's alignment with staff as an advocate were discussed.

Theoretical Sampling

Theoretical sampling, consistent with grounded theory, was the approach used throughout the data collection process (Strauss & Corbin, 1990). In theoretical sampling, "different kinds of data give different views or vantage points from which to understand a category and to develop its properties" (Glaser & Strauss, 1967, p. 65). Accordingly, different slices of data were collected at every stage of the study to develop a theoretical understanding of tension. These "slices of data" were highly beneficial as they yielded as much information as possible on categories (p. 65).

Although the research design accommodated the collection from specific sources of data, the use of theoretical sampling kept the data collection open so that conceptual gaps could be filled. Charmaz (2000) supports this approach by stating,

The initial research questions may be concrete and descriptive, but the researcher can develop deeper analytic questions by studying his or her data. Like wondrous gifts waiting to be opened, early grounded theory texts imply that categories and concepts inhere within the data, awaiting the researcher. (p. 522)

Inclusion criteria were open, particularly at phase one of the study. Early analyses showed that tensions emerged from different personal contexts, therefore the phases that were initially designed in the study were subsequently revised to search for different ways to interpret these initial data. As concepts began to emerge in the data, other data sources were selected to contribute to the evolving theoretical framework (Strauss & Corbin, 1990). For example, the original participants in phase one were asked to prolong their involvement in the study, which enabled me to understand their experiences over time, to observe them in different settings, and in different social exchanges.

These theoretical sampling strategies insured that sufficient information was gathered to maximize opportunities to compare how categories varied in terms of their properties and dimensions and also helped me bring a more informed sensitivity to the final in-depth interview in order to get beneath the surface of described experiences. However, as Strauss and Corbin (1990) admit, the ideal form of theoretical sampling is difficult to achieve. This was the case to some extent in this study, given the availability of time for staff participation.

Revisions to the Research Design

Two main revisions were made to the initial research design. First, the phase one interviews revealed that teachers and administrators identified different contexts of change that caused them tension. Multiple contexts provided a nonhomogeneous group that offered ample diversity. Therefore, phase one participants were asked to participate in the subsequent three phases of the study to further define the emergent themes and to identify their properties and dimensions.

Second, additional interview data and field observations were deliberately sought to help delineate how various categories related to their sub-categories and to one another. For example, participant observation of classroom settings provided better understandings of the various contexts of change, which helped to build an explanatory framework. These changes in observation and participation are supported by Merriam (1998), who notes, “As the researcher gains familiarity with the phenomenon being studied, the mix of participation and observation is likely to change. The researcher might begin as a spectator and gradually become involved in the activities being observed” (p. 102).

The revisions to the initial research design, summarized in Table 1, highlight procedural changes to the study. The initial research design is located on the left-hand column, and the revisions to the initial research design are located on the right-hand column of the table. Noteworthy to mention, under the revisions to initial research design are the procedures and sources of data added to phase two of the study.

Methodology

Consistent with the exploratory nature of the study, qualitative methodological approaches were used. This section begins with a brief outline of the approach used to recruit participants. The remainder of the section presents the strategies used to negotiate acceptance and outlines the data collection procedures.

Table 1

Revisions to Initial Research Design

Initial Research design				Revisions to initial research design			
Phase	Participants	Sources of data	Procedures	Phase	Participants	Sources of data	Procedures
One	8 teachers and 2 school administrators	Interview data	Semistructured interviews	One	8 teachers and 2 administrators		
Two	2 school administrators, 2 school board representatives	Document materials; Interview data	Collecting relevant documents; Semistructured interviews	Two	2 school administrators, 2 school board representatives		
Three		Field notes; Journal reflections	Participant observation at school meetings; Informal conversations	Three	5 phase one teachers	Reflections and field notes	Participant observation in classroom
					4 teachers (chairs of school-wide effectiveness teams)	Interview data	Semistructured interviews
Four	12 teachers and 3 administrative staff	Interview data	In-depth interviews	Four	8 teachers and 2 administrators (revised phase one)		

Participant Recruitment

Participants were recruited to participate in the study by sending an introductory letter to all teachers and administrators at the school. Twenty-one teachers and administrators of 39 agreed to participate in the study. From the 21 respondents, a total of 10 participants that consisted of 2 school administrators plus 8 randomly selected teachers, whose names were drawn from a hat, were chosen to participate in the study.

Consistent with the demographics of teachers within the school, 70% of the total sample consisted of mid-to-late career educators. The years of service within this mid-to-late career group ranged from 14 to 35 years of service. The principal and vice-principal, who were considered newcomers to the school with 3 years and 2 years respectively at the school, each had more than 25 years of service in education. Two out of the 8 teachers, had less than 5 years to retirement. The total sample consisted of 8 females and 2 males. Of the 8 teacher participants, 4 represented the intermediate division, 2 represented the junior division, and 2 represented the primary division.

Negotiating Acceptance

The process of negotiating acceptance and gaining trust was slow, which concurs with Taylor and Bogdan's (1998) warning that "rapport comes slowly in most field research. Even then, it may be tentative and fragile" (p. 27). Several strategies that were sensitive to the daily routines of staff were consciously considered on a daily basis. The first few weeks at the school, while observing at staff meetings, I did not take notes. I listened carefully to the most salient points so I could

recall them for jotting down later. I purposely took my time to enter the staff room during lunch and nutrition breaks but did not enter when staff was dominantly present. I felt that moving too quickly would jeopardize being accepted on their terms. My observations for the first month were deliberately positioned at the edge of the action.

Many of the rules for establishing rapport guided these early steps (Taylor & Bogdan, 1998). Negotiating acceptance was facilitated by lending a hand, being humble, and having a key informant at the school. A university associate who taught at the school played a particularly key role as informal sponsor. She took me “under her wing” to show me around the school and provided background information that helped me to decipher confusing situations. Because she was a highly regarded intermediate teacher, her influence and insider knowledge helped me gain a deeper understanding of the school setting and the technical language of the field. An opportunity to accompany her on yard duty also helped to provide insights into a daily activity that most teachers described as frustrating. These experiences paved the way to understand the patterns and routines of their daily lives as teachers.

Opportunities to lend a hand often arose serendipitously. An annual Christmas luncheon, which was organized by parent volunteers, was one impetus for helping teachers out. The primary purpose of this annual activity was to provide teachers an opportunity to eat together at lunch. Thus, recruitment of volunteers to fulfill yard duty was a key component, so it was by chance one day that I heard about the need for volunteers. My offer to help with yard duty was gratefully accepted, but it later resulted in an opportunity to meet some parents as well as help staff out.

As a newcomer to the education system, I was unfamiliar with the daily routines of teachers, so showing humility and asking simple questions were effective ways of eliciting information. Often, teachers were more than willing to “teach” me about their practice or explain the background of a situation. These casual conversations not only provided information but also revealed insights into the various cultural interpretations of the school.

Data Collection

In an approach consistent with grounded theory methodology, the interview guide was revised throughout the study to explore emerging themes and concepts in detail (Strauss & Corbin, 1990). Qualitative interviews using semistructured interview guides were conducted at each phase of the study. Semistructured interviews were chosen to allow the participants to respond as they determined, an approach that supports the exploratory nature of the research (Merriam, 1988). A three-section field note protocol was used to facilitate the collection of field observations (Creswell, 1998). The first section of the protocol was used to record observations of the interview site. The second section was used to describe the observation process, and the third section was used to note reflections (i.e., speculation, feelings, silences, and impressions) of the interview and how the information from various interviews related. At times, an electronic format was used to capture reflections.

The procedures for phase two data collection were the use of document sources and semistructured interviews. (See Appendix A and B for the interview guide—phase 1 and phase 2.) Document data gathered from relevant school material,

such as organizational structures, policies, procedures, reporting structures, and other external ministry documents, provided background information to understand the school community. Semistructured interviews conducted with the school principal and 2 school board representatives gathered insights related to the culture of the school and school district and perspectives of educational change and tension. On average, the interviews with school board representatives and administrators took 1½ to 2 hours to complete.

The procedures for phase three data collection included (a) documentation of field notes through participant observation at school staff meetings, school events, and professional development activities; (b) informal conversations with teachers and administrative staff to gather insights on perceptions of tension, cultural processes, and cultural impact of tension; (c) documentation of field notes and reflective journaling through participant observation in classroom settings; and (d) unstructured interviews with the chairpersons of school-wide effectiveness teams, each of which took approximately 45 minutes to 1 hour to complete.

The procedures used to collect phase four data included in-depth, semistructured interviews with teachers and administrators. Preliminary phase one and phase two findings were used to guide participants' reflections on their perceptions of tension, the factors contributing to or inhibiting their ability to make sense of tension, the meaning ascribed to tension, their ability to create shared understanding of tension, and their perceptions of the influence that institutional factors placed on the individual meaning of tension. The phase four interviews were

conducted at the end of the study and, on average, took 1 to 1½ hours to complete.

(See Appendix C–Interview Guide–Phase 4.)

Prior to the phase four interviews, an information package was sent to participants to help them prepare for the in-depth interview. The information contained a brief statement that summarized their context of change, that provided a preliminary analysis, and that listed six initial interview questions. The purpose of this interim step was to provide (a) membercheck, (b) reflection time, and (c) probe. Denzin and Lincoln (2000) believe that steps to validate data are important, as “the researcher needs to find a way to allow the participants to review the material one way or another” (p. 393). Although the interview transcripts were verified by the participants, the summarized version of information in the package better fit their needs as busy practitioners. Finally, framing the final interview questions with the following statement, “I need to be in your place to understand how you experience this [tension]” helped to elicit participants’ “subjective” view of tension and served as a probe for participants to understand the desired space of inquiry (Baszanger, 1997, p. 23).

Data Analysis

The acquisition of data was an ongoing process throughout the fieldwork. Selection of a recording device and acquiring the services of a transcriber facilitated the initial steps of the process. Once I was immersed in the field, I realized that the volume of interviews was prohibitive, which necessitated a modification to the Research Ethics Board approval previously granted. The modification was approved

to shift responsibility for transcription from the researcher to an external transcriber. (See Appendix D-Ethics approval.)

Three different kinds of data were prepared for analysis: school documents, observations, and interviews. The school documents were collected throughout the fieldwork experience and were arranged in order according to the questions they applied to in the study. To facilitate analysis, the verbal and observational notations taken during classroom and field observations and the subsequent reflections were typed electronically. The collection of the interview data was the most time-consuming process. The interviews were digitally recorded and sent electronically to external transcribers. Once completed, each transcript was checked against the appropriate recording and any necessary corrections were made.

Stages in Data Analysis

Consistent with a grounded theory approach, a constant comparative method was used to analyze the data (Charmaz, 2000, 2005, 2006; Glaser & Strauss, 1967; Strauss & Corbin, 1990). Comparative analysis involves a continuous process of inductive analysis as ideas are developed throughout the data gathering and analytic process. The stages of data analysis are illustrated in Figure 1.

Coding and analysis occur simultaneously with data collection to help “gain a new perspective on our material and to focus further data collection” (Charmaz, 2000, p. 515). A multistaged coding process was used in the analysis of the data (Charmaz,; Glaser & Strauss, 1967; Strauss & Corbin, 1990). The approach called for the initial use of *open coding* of the raw data to develop ideas inductively. Coding began as soon as the phase one interview transcripts were available.

Stages of Data Analysis:

Coding Strategies

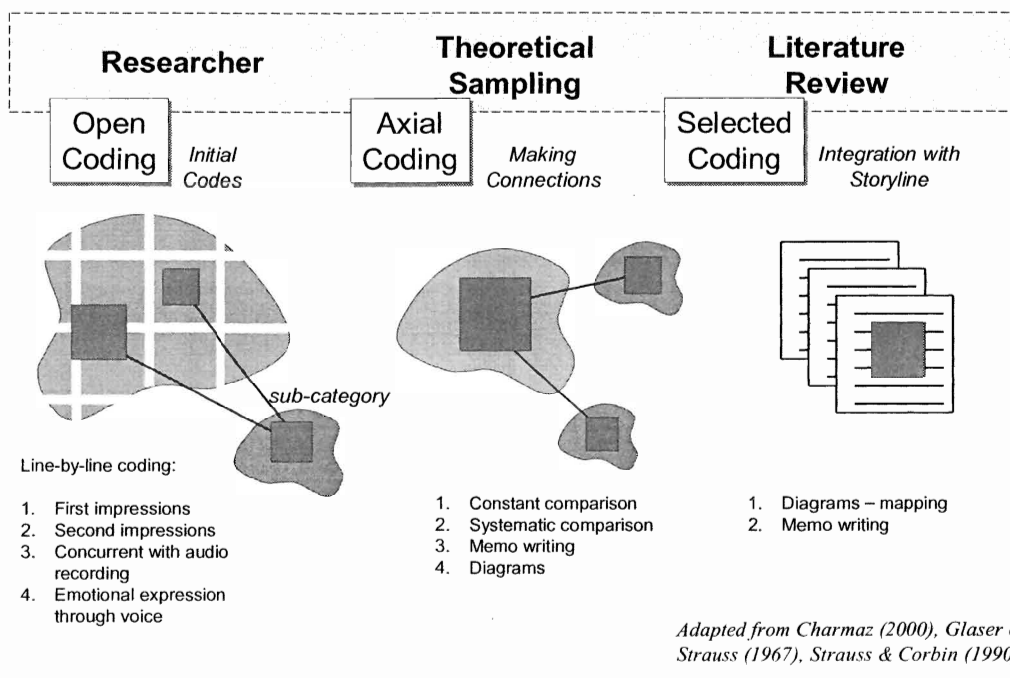


Figure 1. Stages of data analysis.

The first step of open coding involved line-by-line coding of the data to identify first impressions, which involved searching for surprising, counterintuitive, unexpected, or common ideas and writing these impressions and notes on the side margins of each page (e.g., identity loss). The second step involved a more careful line-by-line review of the transcripts to conceptualize the data to see if they fit the initial impressions. The third step involved another line-by-line read of the transcripts while at the same time listening to the audio recording. Hearing the sound of the participants' voices helped me to stay attuned to their view of their realities. An important fourth step was the identification of emotional expressions through voice, which involved simultaneously reading the transcripts and listening to the audio recording. Audio expressions such as whispers, silences, "emphatic speech" tones, sighs, and laughter were tagged to phrases in the text to better understand various potentials of meaning (Selting, 1994, p. 404). These emotional expressions were deemed critical to detecting any potential unstated assumptions and implicit meanings of a significant situation. Coding emotional expressions and attaching them to specific phrases served as a sensitizing lens to stimulate thoughts on how participants talked about their ways of "constructing the[ir] sense of events" (Edwards, 1999, p. 279) and provided guides for subsequent data collection.

Once codes from steps 1, 2, and 3 were identified, comparisons were made between the codes. This constant comparison approach meant making data comparisons between different participants, for the same participant at various points in time, between different incidents, and between categories (Charmaz, 2000). A systematic comparison technique that compares "an incident in the data to one

recalled from experience or from the literature” was also employed at this stage (Strauss & Corbin, 1990, p. 95). These types of comparisons helped to stimulate different ways of thinking about a category in terms of properties and dimensions. For example, one such comparison was between the concepts of the experience of an “altered pattern” due to workplace change to that of a “disruptive experience” of a chronic illness. In this case, the qualifiers *altered* and *disruptive* were the dimensions of the property *response*.

Memo writing and diagrams, in the form of mapping, were used at this stage to assist in formulating ideas and process related to the emerging ideas. Strauss and Corbin (1990) argue that “the contents of memos and diagrams are crucial to the developing theory” (p. 220). In this case, memos were used to brainstorm ideas that were identified in the interviews, which helped to document the various emerging thoughts related to a particular idea. Memos were also used to “keep the research grounded” as well as “gain analytical distance from materials” (Strauss & Corbin, p. 218). Accordingly, writing memos helped me to keep a necessary distance between the grounded data and the conceptualized ideas. For example, as I wrote about the experience of tension, I adopted the role of participant, which led me to different questions about the participant experiences that provided new insights. Diagrams in the form of mapping were used in various ways to depict process and to “relate two or more categories to each other” (p. 221). A large bristol board presentation sheet and post-it notes were used to depict the lines of action and to visually see the interactions of the properties. Smaller diagrams were used often to untangle a line of action and to better understand the relationship between categories.

The use of memo writing and diagrams advanced the process of “reassembling the data that were fractured during open coding” (Strauss & Corbin, 1990, p. 124). The transition from open coding to reassembly was gradual. Procedurally, this approach called for the use of axial coding, which is the act of relating and making connections between a category and its subcategories. At this stage, the process of connecting categories to their subcategories was aided by answering questions “such as why or how come, where, when, and how and with what results” (Strauss & Corbin, p. 127). In so doing, the context, interactions, and consequences of phenomena emerge, which relate “structure with process” so the dynamic nature of a phenomenon can be revealed (p. 127). It was at this reassembly stage that the dynamic nature of tension and its relationship to capacity were better understood.

As distinct categories were integrated, a larger theoretical scheme took form. The process of integration was attained through selective coding, which involved making decisions about how to integrate categories to see how they all fit together. At this stage, coding was directed at using the initial codes from step one that appeared frequently to sort the vast amount of data. I made decisions about the selection of codes by testing the fit between the emerging theoretical framework and the reality it described. The use of similar analytic techniques as were used in previous stages of analysis helped to identify relationships at this stage. For example, diagramming, in the form of a large map, was used to visually display various categories in evolving frameworks as they took shape. The flexibility of this approach supported the fluidity that was necessary at this stage.

Activity System Framework

An activity system framework informed my early interpretations of the data. The dimensions represented within the framework enabled me to analyze more broadly the contradictions creating tension. Activity theory originates from the sociocultural theory of Lev Vygotsky. The contemporary evolution of the concept has been influenced by the milestone work of Engeström (1987, 1993), who elaborated the theory and modified it to include social and collective aspects of human activity. An activity system relates a subject (one or more individuals) and an object through mediation of tools, which are used by the subject to transform the object into an outcome. In Engeström's expanded activity model, the subject's activity is constrained by its relations to a community of practice as mediated by conventions, policies, and rules, and the division of labour mediates the community's relationship to the object. Activity systems are not stable and harmonious systems; instead, they can be described by inner contradictions caused by tensions among the components of the system (Cole & Engeström, 1993). An activity system framework as depicted in Figure 2 provides a broad sociocultural view to understand change and the activity structure of activity.

In this study, an activity system framework was used as a tool to identify possible points of contradiction or tension between the multiple interactions of work activity as participants experienced change. Interactions between school norms, shared artifacts, hierarchical structure, and the practices that mediate relations between them were mapped to locate points of tension in work activity.

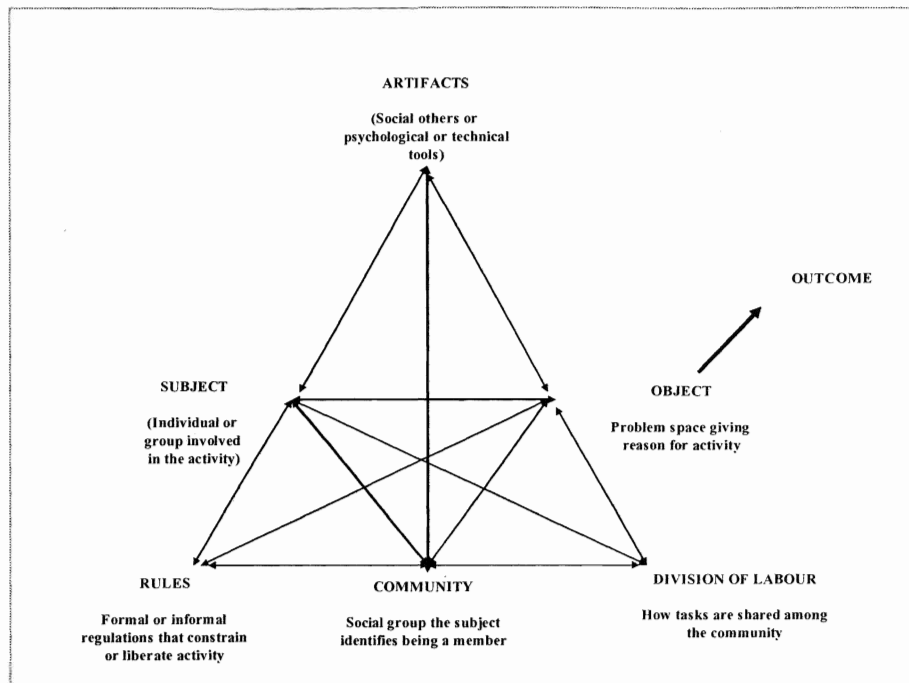


Figure 2. Activity system framework.

Activity systems helped to visualize and put into words observations to better understand the context of change that participants identified as causing them tension. Lynch (2003) suggests: “Tensions arise when the conditions of components cause the subject to face contradictory situations that hampered their attainment of the object” (p. 103). Activity systems themselves are not a central feature of the findings but instead were used as descriptive tools to help to visualize and share richer understandings of complex systems of change in everyday settings.

Development of an Interpretative Theory

Grounded theory studies are designed to generate substantive theory. Strauss and Corbin (1998) suggest that a grounded theory is “constructed” in the sense that the researcher reduces the data into concepts and sets of relational statements that can be used to explain, in a general sense. Such positivist definitions of theory view “theoretical concepts as variables and construct operational definitions of their concepts for hypothesis testing through accurate, replicable empirical measurement” (Charmaz, 2006, p. 126). According to Strauss and Corbin, hypothesizing is a deductive process because it involves making interpretations about the data. In this view, the objectives of theory are explanatory and predictive.

An alternative definition of theory views “theoretical understanding as abstract and interpretative” (Charmaz, 2006, p. 126). Interpretative theories “illuminate patterns and connections rather than linear reasoning” (Charmaz, 2006, p. 126). This type of theory assumes multiple realities and emphasizes practices and actions. In this view, knowledge and theories situated in lived experiences, aims to

- conceptualize the study’s phenomenon to understand it in abstract terms;

- articulate theoretical claims pertaining to scope, depth, power, and relevance;
- acknowledge subjectivity in theorizing and hence the role of negotiation, dialogue, understanding; and
- offer an imaginative interpretation. (Charmaz, p. 127)

A theoretical understanding of tension emphasizes understanding rather than explaining or predicting (Charmaz, 2006). This study explored “how” and “why” in the sense that it sought to understand how teachers and administrators made sense of tension and why they responded as they did. Employing a constructivist approach meant being as close to the inside of the experience as possible in order to “theorize the interpretative work of participants” but also to acknowledge the interpretative result (p. 130).

Understanding tension meant exploring the implicit meanings that constituted categories in order to visualize how they fit together. It also meant being alert to the tacit meanings and conditions embedded within the narratives to understand how these meanings linked to their actions. Thus, the fundamental contribution of grounded theory methods resides in providing a “guide to interpretative theoretical practice not in providing a blueprint for theoretical products” (Charmaz, 2006, p. 129).

Ethical Considerations

This study followed the ethical guidelines as established by the Social Sciences and Humanities Research Council of Canada and administered by the Brock Research Ethics Board. Pseudonyms were used where necessary (e.g., in the use of

direct quotes), and all direct quotes were scrutinized to ensure minimal risk of participant identification. The names of participants did not or will not appear in the written or oral dissemination of the research study.

To ensure confidentiality of the data, no participant name was identified in any discussions pertaining to the study. All research discussions were held in secure locations and not in public spaces. Electronic files of digital recording were stored on my personal computer and were password protected. Typed transcripts of the interviews were labeled using pseudonyms. A master list of participants and the related pseudonyms was stored in an electronic file on the computer and in a separate and secure location in my office. The assigned pseudonyms were used when reporting the findings. In the written report, participants were described in general terms (i.e., gender, years of service, etc.). The name of the organization was not reported in the findings. Only a general description of the site of analysis (geography, location in Ontario, size) was reported in the context chapter of the dissertation. The only people who viewed the original transcripts and raw data (paper and electronic copies) were my academic advisor, a transcriber, and me. Members of my dissertation committee could request to see the data, but none did so. All identifiers were removed from the transcripts and raw data for studies involving the use of this data as secondary data. Electronic data will be retained indefinitely in a secure location in my office. Confidential shredding of the master list linking names of participants to pseudonyms and materials containing addresses and contact information will occur after 4 years.

The study participants were informed in writing and verbally of their right to refuse to participate or terminate their involvement in the interviews or any other part

of the study. It was also emphasized that interviews could be terminated at the request of the participant and would result in no negative implications. Confidentiality safeguards also provided participants the ability to express their frustrations related to experiences of tension and feel comfortable with the process.

Information about the study will be provided to participants in written form. Immediately following the study, participants received a letter of appreciation for their participation in the study. The school board and/or designate, principal, vice-principal, and teacher participants will be sent a summarized version of the study results upon the completion of the study.

Summary of the Design and Methodology

The qualitative research methodology for this study is consistent and compatible with the philosophy of the research itself. The design and methodology assumed that experiences of tension were integral components of school context and culture and the meanings of teachers and administrators were a part of the actual activities and contexts in which they occurred. Consequently, a case study research design allowed me to focus on the particularity as well as the common experiences within the setting (Stake, 2005) to explore how teachers and administrators made sense of tension. This singular case design was comprised of many contexts and lent itself nicely to the complex, situated nature of tension, which made relationships more understandable.

A grounded theory approach and the use of multiple methods also encouraged proximity to the research setting, which allowed for deeper understanding about the meanings, actions, and worlds of teachers and administrators in context. The

comparative methods of grounded theory provided “analytic scaffolding” on which to gain some sense of the structural and organizational sources of tension and their differentiating influence on participants (Charmaz, 2005, p. 517). These coding practices raised themes to a level of objectivity that offered participants a place to bring forward divergent experiences so they could scrutinize assumptions in order to encourage authenticity and reliability. This research design and methodology provided the basis for understanding the relationships and meanings of tension and the various ways teachers and administrators made sense of them. These understandings are presented in the following two chapters. In Chapter Four, the descriptive findings related to the context of tension are presented, followed by Chapter Five, which presents the findings related to how teachers and administrators make sense of tension.

CHAPTER FOUR: CONTEXT OF TENSION

*Music, when soft voices die,
Vibrates in the memory
Odours, when sweet violets sicken,
Live within the sense they quicken.*
Percy Bysshe Shelley

The data showed that tension was complex and emerged within a social context already shaped by language, meaning, and modes of interaction. As participants reflected upon the experiences of change that created tension for them, they described disrupted patterns, interactions, and connections between and within a multi-dimensional context of tension. Drawing firm lines between the shifting layers of context was challenging, but understanding tension meant teasing apart data to delve into the implicit actions of individual patterns of meaning. The subjective meanings of tension, what participants thought and felt, brought to life the complexities of and the various meanings of change.

The culture, character of change, and the dimensions of change were terms I developed to illustrate the distinctive features of the context that were directly tied to how participants made sense of tension. Culture represented the various perspectives that teachers, school administrators, and school board personnel described to explain how change happened within the school. The character of change reflected the sustaining characteristics of uncertainty and momentum that brought to life the substance, motion, and shape of change, which revealed its complexity and force. The dimensions of change were the various elements at both the institutional and personal level that disrupted participants' expectations, patterns, and routines to create tension.

As participants reflected upon their change experiences, emotions were triggered that spanned across time, that situated tension within and between the context of the present, past, and anticipated future. Together culture, the character of change, and dimensions of change formed a complex picture to understand tension.

Chapter Four presents the multi-dimensional layers of context in which tension emerged. The contents of the chapter consist of three main sections that together provide a holistic context to understand tension: (a) culture, (b) character of change, and (c) internal and external dimensions of change. The final section of the chapter presents a theoretical perspective of the context of tension.

Culture

The data for this section came from in-depth interviews with school administrators and school board representatives. The perspectives they talked about directly or that emerged through analysis of the transcripts revealed shared assumptions and values towards an organization-wide vision. The school board representatives and school administrators described culture in integrative terms that stressed a collective-wide community with support coming from leadership. One such account, from a school board representative, articulated the broad vision in this way:

The evolution of our organization versus change ... part of our focus is attempting to allow a system school—a system family of schools, schools, and individual level—basically to become a professional learning community... we're starting strategically with groups who in fact will have the need to be on board, the need to understand, to support the learning—our system leaders. It is

my role as associate director ... I am really the assessor. I facilitate the learning of the organization and guide it and help determine when we're at a particular point in time.

The people in the school board continued to reel from a decade of intensive changes that transformed curriculum, policy, funding, legislation, and collective bargaining. While educators continued to work through these changes, the board was concerned with two other main waves of change relating to higher accountability for student achievement and teacher collaboration. With pressure on school personnel to move forward on the latest board initiative for incorporating professional learning communities, a decade of breaking relationships and mistrust resonated in the background. Sarah, another board representative, acknowledged,

The timing's been horrible. Just at the time where for us to work and learn differently, where it depends on relationships, we've just gone through 10 years of breaking relationships down. And not only in terms of things that we didn't have any control over but government mandates that come, and then there's also been changes in relationship to federation. Our administrators were part of the federation. They were pulled out, so that separates the classroom educators further from management.

The long-term vision for professional learning communities focused on creating an integrated, aligned educational organization. According to another board representative, this evolution represented a fundamental identity shift, both structurally and procedurally. Bert said, "When you start to introduce something, some major initiative like professional learning community, that then puts in motion,

or your thinking around some of the other ways in which your structures need to change, your processes need to change, to align that.” A systematic process focusing on breaking down barriers while building relationships meant evolving structures and processes to enable collaboration and learning.

The forecast of a 5- to 8-year cultural shift emphasized building infrastructures, enabling effective use of data, and focusing on results and accountability. Whereas early attention was on system leaders and the formation of families of schools, children were at the center of the current process. The emphasis on building a system-wide organization revealed integrative intentions. At the same time, the idea of developing a level of comfort with the tension legitimized inconsistency. Bert said, “Part of our process is to continue to articulate the tensions in the organizations and use them in meaningful ways.” He went on to describe tensions the board had articulated as contradictions, characterizing

the cultural dynamic between autonomy versus interdependence, innovation versus accountability, centralized versus localized, cost versus gains, learning versus teaching/leading, balanced involvement versus over/under involvement, coherence alignment versus ambiguity, and support versus pressure.

Tension, normalized as a catalyst, was used as a tool that provoked the system and enabled growth. Bert described how he used tension to assess when to act. He said,

Whether there has been sufficient ambiguity to challenge, question, and go

Deeper, but at the same time, the need to act in order to make it a little more concrete and specific for people, to decrease their personal tension and strengthen their sense of security to allow them to move into the next step.

Bert also said, “When you’re on the border of it [tension] becoming negative, we act and turn it into a truly positive and allow the tension to build again to the next stage.” He said, “Tension is perceived to be negative as opposed to positive; it’s perceived to be personal instead of systemic, and it needs to be kept at a system level.” He said, “95% of the problems in the system are system problems, not personal, as a result of system misalignment in the system, poor processes, and structures.” These contradictions and misalignments noted by this board representative could also be seen in the data collected at the school.

Lakeview¹ Elementary School was a Junior Kindergarten to grade 8 school situated in an upper-middle class neighborhood. The school had earned a reputation within the board for achieving high academic standings and retaining a large number of long-term staff. The administrators were new to the school, with the vice-principal and principal in their second and third years respectively. When they arrived, they saw staff as very guarded and considered trust a major issue. Despite the great reputation of the school and the high academic achievement, the administrators felt there was need for change. The principal stated, “The school is considered a private school of the public system, and many teachers ride on the coattails of the school’s reputation ... many teachers feel they don’t need to change.”

¹ Lakeview Elementary School is a pseudonym.

The principal described relationships as the centerpiece for achieving her vision. Building trust and increasing professional dialogue, using characteristics of the board professional learning community initiative, were the basis for the direction of staff development. She said, “Building the culture and if you have the mission, which we worked on last year, and you have the culture, then the emphasis on learning is going to come.” Other structural changes such as rebuilding divisions and creating space and facilities to bring staff together were the various integrative strategies she felt created a good, solid culture. The principal believed it was “the little things such as feeding staff and bringing them together and opening up space to create feelings of togetherness” that encouraged clarity and harmony.

The school-wide effectiveness plan was structured to focus on literacy, numeracy, technology, and choices in action. The principal admitted it was difficult for teachers to shift from classroom responsibilities to school-wide responsibilities but said,

The previous principal had done a great job. She said that everybody had to be on the school effectiveness plan team. I inherited that, and they had been through a year of that, and I was able to continue on with that and would like to see changes in the way meetings take place. Of course, I think it’s just first getting across the idea that we’re all responsible for the school effectiveness plan and we all have something to contribute to it.

Although the principal admitted that “structures take time,” she also acknowledged that “communication of our school effectiveness plan is something we still need to work at, both with our community and with our staff.” She described her overall goal

as “implementing that whole practice piece, and once you learn that, you practice it, and you’re doing it, then that’ll become the mode of operation. It is getting people to that and using our staff meeting time effectively.” This spirit of cohesion reflected the integrative views of culture that were dominant at both the district school board and the school.

Character of Change

Throughout the months of observation and conversation, both *momentum* and *uncertainty* emerged as sustaining elements that characterized change. These features brought to life the substance, motion, shape, and form of change that affected participants. Uncertainty and momentum helped to define the complexity of change rather than visualizing it as static and linear. These characterizations provide an appropriate backdrop to understand the internal and external dimensions of change that follow.

Uncertainty

Change set in motion a series of events that altered patterns and routines, interrupted expectations, and forced participants into situations of uncertainty. Uncertainty occurred when information was missing. It meant being in an unknown circumstance and losing the ability to control and anticipate the future. Adelle said, “For me, one of the things that creates it [tension] is just the unknown...I don’t like going into situations where I don’t know what’s going to happen.” For her, uncertainty was connected to control and power. In situations of control, she said, “I hold the power, I have all the information,” which enabled her to “do what I need to

do in a concise period of time and I'm done with it." Thus, in situations of uncertainty, without information, she felt both powerless and out of control.

Uncertainty also occurred when situations were confusing or inconsistent. It meant dealing with ambiguity. Lois believed that more and more change was "downloaded to teachers to make it work, but they haven't really conceptualized it." She believed that partially conceived change added work for teachers. Gregory also wondered "if they really thought it [change] through and how the total impact affected teachers." These teachers felt that partially conceived information or directions generated multiple interpretations that created confusion and doubt about how to proceed. For example, according to Lois, an unclear definition of the *first step continuum* process created stress for staff. Lois remarked, "Not everyone is on the same clear definition; it's very subjective and so involved in interpretation." Without clarity, the process extended beyond the expected timelines and left some participants feeling overwhelmed. Lois described her experiences as follows:

All of a sudden, this particular edict came from on top. It created a lot of stress and tension on all of the staff. First of all, we really didn't know what it was. They didn't really in-service us. They came and glossed over it. At first, it was internally. Our individual teachers went to the workshop, and they came back and they were required to disseminate the information to us. Some of them were not even sure what it was all about, and it wasn't until almost a year of bumping through this they finally had [person] come down and basically she said, "It's really the same things you've all been doing. It's just got a different name."

When situations were inconsistent, tensions related to fear, ambiguity, and especially mistrust emerged. Over the years, Gregory had seen “things change but they don’t always change,” which left him feeling unsure and afraid about the support he would receive from administration in threatening situations. He recalled a dispute involving a parent, a situation he described as threatening.

Based on previous experiences, I didn’t know if I had the support of [principal] and it was because of another issue. And so I was very tense there, but when I got to explain the situation, it was still tense, and then the fact that you don’t really know what could happen, you’re afraid, because my livelihood is my job.

A challenge for all teachers was dealing with a partial picture of change. The vice-principal explained the strategy of approaching change incrementally and admitted they (administrators) “don’t necessarily chip in the whole thing. We don’t always have to do the whole thing. And sometimes you don’t have to do any of that. You know, sometimes you cannot pass it along just yet.”

However, parts of a picture resulted in information gaps, which created uncertainty. The gaps often reflected an unclear purpose that made it difficult to interpret, analyze, and process change. The gaps prevented teachers from seeing the whole picture to know where they fit within it. Adelle confessed to gathering bits of information and described her perception about reluctance on her colleagues’ part.

A lot of people wanted to see the whole picture, and a lot of times you get parts. And the person that’s in charge knows what all those parts are and knows how they blend together beautifully, but not everyone else knows.

There are administrators that don't feel that everybody else needs to know all the parts. That's their way of looking at things, and that's very valid for them, but if you juxtapose that to people who really need to know, then that becomes kind of an anxiety thing for those people that don't know the whole thing.

Without being able to visualize the whole picture, participants were forced to experience instability longer. Lois described being overwhelmed in situations where she had to "make the change but not be given the whole piece of information."

In situations of prolonged uncertainty, without the facts, hearsay sometimes filled the gaps. However, the imprecision of hearsay often led to greater uncertainty and self-doubt. In one such case, multiple interpretations and conflicting rules surrounding a surplus notice left Mazzie doubting herself: "What had I done to be put in there? Why? Was it because I challenged her, and did she feel that I'd gone behind her back?"

In another case, Ellen felt report cards were "supposed[ly] getting worse," which created anxiety for her. She described the thought of potentially dealing with one more change:

Now the thing that's hanging over us in terms of more change is that there is a new way of doing the report cards through the internet, and supposedly, what I know about that is there are about 22 schools in [the school board] that were doing this over the internet, and it was a nightmare. It was just a nightmare; I didn't read all the stuff because I just didn't want to go there. It stresses me out. It stresses me out just thinking about it.

Lois also talked of hearing about report card problems at a stewards' meeting. She said, "From what I've heard it's a horrendous problem that the board hasn't really problem-solved and worked through." These examples show the role that hearsay played in generating additional stress in relation to specific changes. They are similar to many circumstances described by participants in which patching together the big picture with bits of fact, hearsay, and assumption created stress and difficulty.

Momentum

Searching for time was the telltale sign of too much change. The busyness of the day-to-day coupled with an ever-increasing amount of change left many searching for time. Many participants described time as an object to locate rather than the experiences that gave it shape and meaning. The search for time often signaled their distress and reflected a pace too fast to cope. Lois felt change was constant, where "you never get settled to using something, where you feel you can tackle a job, where you're comfortable." Other clues illuminating the pace of change were phrases such as "barely keeping your head above water," "wearing multiple hats," and "being on the bell."

The amount of change redefined the daily rhythm of each day. Lois described the tension of teaching as "everything that is being piled on, piled on, piled on, and nothing is ever taken away." She felt teaching these days meant "running to not drown." The constant stream of change left some participants feeling incompetent, dissatisfied, and behind. The subtleties of escalating change slowly consumed time and space, transforming the daily practice of teaching and leaving no time for reflection and barely enough time to catch their breath. Gregory said, "I'm never

going to get ahead. I'm never going to accomplish what I've been asked to accomplish before I get something else." With no time to restabilize before another change hit, Gregory often felt dissatisfied and described tension as "your plate getting fuller and another thing added to the plate." Instead of a plate, Roger said, "You've got a serving tray and it's filled." The shift in size, from plate to platter, symbolized the increasing momentum of change and revealed how it reshaped and re-formed the meaning of time.

Time and space compressed as the pace of change increased. When teachers discussed implementing new programs, they talked in terms of arranging minutes. The minute-by-minute precision of juggling the schedule to fit one more thing into the day meant even more compression. It meant teachers had to press themselves into smaller grids and structures to maneuver through the day. One such example was an intermediate teacher who puzzled about how a new *daily quality fitness program* would fit into the day.

How are we going to get quality daily fitness into our program? Where are we going to take it from? Where? You know, they're not giving us anything, [but] they're saying make it work, so I might see this as additional. There's something more that we're going to have to deal with. And it will have an effect, a snowball effect, on certain areas. And whether that's a particular program, I don't know. Where are you going to get the time? What is it going to look like? I know it works in some other schools, and I guess you just have to have somebody come in and figure out how to do it. I don't know what it looks like. I don't really have a really good handle on the picture sort of thing.

We know we have to maybe implement something. Oh here, just take it and do it on your own time.

The annual cycles of change not only ordered daily life in the school but also brought new students to teach, new patterns and routines to establish, new staff to meet, new leadership to adjust to, and new subjects or grades to learn. Even without any externally imposed change, the natural rhythm of internal change affected the daily lives of teachers. The peaks of change throughout the year varied depending on various responsibilities of teachers. For many teachers, the first term was the busiest because it meant adjusting to new students and establishing new routines and patterns around them. Mary admitted she was a different person by third term because “routines and patterns are established.” In addition to establishing routines, the first term left many teachers struggling with insufficient time to mark student work for report cards in time for parent interviews. Lois said,

I think it's [report card] just a tense time at school; people tend to snap at one another because of the pressure; the time line is so short first term. I don't find it as tense at the end of the year because you've just such a wealth of data and assessment data that you feel you can handle whatever parents come in—you know the kid's got a track record, and you have the black and white stuff. I think everyone gets more tense in the first term because you have about 2 months before writing report cards, and it's very, very difficult to accurately pinpoint a student's ability when you only see them for a short duration of time and trying to substantiate your statements and having enough data. It's

very hard, and that in itself, because we're driven by report cards, we're driven by interviews, and it creates a stressful, tension-filled situation.

With little time at the start of the year, Lois found the job of accurately tracking and recording student data a difficult task. The principal said the busyness was difficult and admitted, "I'm just so inadequate in getting into classrooms" but also remarked,

There are points in the year where you can have your best teachers that are falling apart at the seams, and that is report card time and the end of the year when they have so many balls to juggle. Sometimes we'll have a teacher that says something or does something so out of character.

The additional responsibilities around extracurricular activities meant the end of the year was the busiest for Gregory. He explained,

This [third term] is the busiest time of the year because not only do I have to cram in the program that I haven't been able to get to that I'm responsible for, because I'm going at the kids' rate, not my rate. I still am responsible for it. Plus track and field season is coming up, the relay, and all that stuff, graduation, the Quebec trip, all these things, right?

With data at the core of measuring accountabilities, the natural ebb and flow of change throughout the year exaggerates certain stress points, such as report card time. Ellen believed accountability was the root of tension. She said,

[Increasingly] they want the data—data for not just the standardized testing, which is out of our hands, but the data for the reading scores, the data for math scores, the data for this, all being now put into a program with all this data.

Although Ellen thought data were useful to see, she said it was “an added thing to do” at the busiest times of year. The redefinition of accountability and the various methods of collecting data throughout the year began to shift the regulation of minutes and the clock that was used to measure time.

Dimensions of Change

The dimensions of change represented the various elements altered through change. A broad sociocultural framework helped to illuminate dimensions of change to understand more deeply the various tensions. The use of an activity system framework as an analytic lens allowed me to visualize and articulate the dynamic interplay between dimensions before and after a change. Mapping descriptive data onto a framework illuminated various contradictions that created tension. In many cases, change shifted across several dimensions at once, creating tension in various personal and institutional dimensions. The personal dimensions were identity, teaching standard, life/career stage, history, and knowledge base, whereas the institutional dimensions of change were rules, resources, and leadership.

Personal Dimensions

Identity and teaching standard. The standards guiding the judgment of professional practice for Mary meant getting to every child. This belief helped her maintain an image of herself as a competent professional. Her training as an early childhood educator formed the foundation of her teaching practice and continued to influence her approach as an elementary school teacher. Prior to becoming a teacher, Mary worked at a number of little centers under the umbrella of the Association for the Mentally Retarded. Her educational background in *exceptional child in the family*

positioned her well as a preschool teacher for special needs children. These early-childhood education experiences emphasized the support of children as individuals and activities responding to the developmental needs of particular chronological ages. The Special Education Bill 82, which officially regulated the integration of children with special needs into the classroom setting, influenced her decision to teach in the public system. She said, “Finally one of my little guys who was in the center was integrated into the classroom, and I went with him as his deaf/blind intervener into a kindergarten and decided I wanted to go into teaching.”

Mary explained the big tension for her was “the number of JK/SK children in each class,” which she felt was unfair to the students. Her class of 23 children included three severely special needs students whose ages ranged from 3 to 6 years. Mary found it difficult to support the needs of all the children in her class, especially the special needs children. She said, “It’s just very frustrating that I cannot be with all those special needs children ... I can’t always be with the other kids.” The structure, conformity, and control required in a large elementary class continually nudged her values of treating individual children. Mary admitted, “When your [standard] of practice and your trying to be professional doesn’t go that way, it is difficult.”

Gregory wielded the term *professionalism* frequently throughout our conversations. He used the term professional not only to define his identity as a subject specialist but also at times as a shield to protect him from the growing expectations that an elementary school teacher should be able to teach anything. Despite the expectation to teach any subject, Gregory strongly identified with being a subject matter specialist and felt that teaching any subject was unrealistic. Randy also

felt pushed because “they want us all to be generalists, but then they want specialty subject performance.” The tension for Gregory was “all the committees we sit on and all that growth [school-wide effectiveness] committees.” As a subject specialist in physical education, he felt stretched to participate fully as a numeracy team member. He explained, “My area is physical education, and yes, I do teach math, and I have taught math for a long time, and I don’t consider myself an expert in math at all.” Gregory’s sense of worth and esteem was also tied to being an expert, which conflicted with his ability to contribute as a numeracy team member.

A clash of values was the impetus for Joanne to transfer midyear, 2 years ago at Christmastime, to a new school, which she explained was “an unusual time for anyone to make that kind of transition.” She said, “It was because of a situation that caused tension in my teaching practice; I had to make that move.” Joanne, who was in her 14th year of teaching, described herself as a very ethical person who was committed to certain values and felt strongly committed to ethical practice. She believed:

Issues of choice, teaching holistically, and encouragement were necessary requirements for deep growth and all the parts of the ecosystem together, that strive for balance and interconnectedness.

Joanne’s belief in the uniqueness of each child conflicted with the views of her previous administrator, who apparently believed that “competition, honour roll, getting high marks, being successful at all cost, not nurturing the soul or the spirit of the child were more important.” She felt underappreciated but said unethical leadership practices tipped the scales for her and forced her to leave. She believed

that the values the principal espoused bore little resemblance to what actually happened day-to-day. She felt the public propaganda and the materials adorning the school walls for parents and certain teachers were contrary to reality. She said, “There were people who absolutely loved him because he was a disciplinarian” but that the “demeaning and unethical things chipped away at my soul and who I was as a person.” Her ethical beliefs coupled with an inability to deal directly with an unjust situation due to the power of leadership eventually forced her to leave because “I couldn’t stay there anymore and feel good about myself.”

Life/career stage. The maturing lives and careers of teaching staff together with memories formed and situated in particular historical periods affected their perspective of change. At the height of Mary’s frustration with trying to manage her large JK/SK class, she admitted, “I feel tired, I feel worried, I feel tense, and I have been the last few years.” She said, “As I get older, you don’t have the energy and the patience that you did.” As her frustration escalated, she contemplated priorities, which reminded her of earlier reform years when the profession underwent government bashing. She said, “It just deflated people, and people didn’t give up, but they felt so discouraged after everything, especially people who have been in, like I have, for 20 years or so.” Again, she looked at her priorities and reaffirmed that “family comes first.”

Ellen admitted being overwhelmed by the pace of change and said, “As I get older, I am a little more reluctant to try new things.” Lois, who was in her final year of teaching after a 35-year career, similarly witnessed the evolving cycle of change. She said, “They [school board/government] reinvent the wheel—same old, same old,”

but the difference today was that “change is external, but the change must be handled by you, without support.” She contrasted the support structures today with earlier years.

Six years ago when I was still teaching family studies, you got group meetings, sometimes during PD days, sometimes after school, where you met with people who were teaching the same subject. They would come, and they would give you sort of the tried-and-true, “Gee, I found this activity and the kids loved it. This is how it ties into the curriculum program.”

Lois attributed her rising reluctance and eroding commitment to her career stage. “I think the older I’ve gotten, the later in my teaching career, the more I’ve gotten to the point where I sometimes just say, this too will pass.”

History. Previous life experiences and events mediated how change influenced tension. These preceding events played an important role in how tension evolved over time. In times of escalating tension, these historically situated experiences intensified for some, as they fondly recalled earlier times. For many long-service participants, their experiences of the past held strong beliefs about the meaning of teaching and their identities as professionals.

For some participants, change triggered experiences of previous initiatives related to educational reform. These experiences surfaced memories of a time when participants felt passionate about their contributions to the profession. While serving as union president, Roger recalled better times, “when the board really co-operated with the union, and the union would bend over and cooperate in return.” He felt proud of the give and take but said, “When the structure changed [removing management]

in the late '90s, it [relations] became antagonistic. Board members became very antagonistic to the union, and the provincial government became very antagonistic to the union.” Roger believed that new teachers entering the profession “don’t realize the historical effect of some of the things they’re being asked to give up and how hard people fought for them.” He found it difficult to untangle these hard-fought experiences of the past from current changes.

Lois, who was in her final year of teaching, found it difficult as she reflected on the past. As a family studies teacher, she recalled the excitement she felt “getting together with all the other teachers in family studies, having family studies group meetings” and talking about how it tied to the curriculum. She contrasted the camaraderie of the past with the present situation where “the classroom teacher is by themselves because everybody’s doing somebody else’s job.” Lois felt torn between being committed and feeling like “I just don’t care,” which made the idea of retirement bittersweet.

Gregory’s self-worth and satisfaction as a teacher tied to being a subject matter specialist. The increasing expectations to teach all subjects created tension “like you wouldn’t believe.” While describing tension, he referred to his perfect job.

I had a great, what I consider to be a great job. A super straight boys’ physical education. It was wonderful, the perfect job that I had was when I was at [previous school] and I taught boys’ physical education, grade 6, grade 7, grade 8, boys’ phys ed. For 9 years, straight physical education. We had physical education three times a week, 80-minute periods. It was absolutely perfect.

These memories provided a reservoir that sustained his confidence in times when new expectations challenged parts of his identity as an expert teacher.

For others, like Adelle, personal life experiences imprinted firm visions of positive outcomes and shaped “a clear picture of what I hope to attain.” An earlier defining experience of adversity helped her move through present situations of tension.

I think, for me, I can go back to one thing that sticks out in my mind, an incident that happened when I was 16, that I think set me on my road. I was the oldest; I wanted to get a job with the city as a camp counselor. I was the oldest in my family of three kids, so the youngest one is 10 years younger than I am, and so therefore I was sort of always the one to forge ahead and try those new things. So I said to my dad at that point, “I need to get down to city hall to get an application for camp counselor.” And he said to me, “What a waste of time. Who would hire you?” And I remember thinking at that point, “You know what? Damn you, I’m going to get that job.” I took the bus; I went and got the application; I did the first interview I had ever done in my life. I did it myself. I got the job, and you know what? I don’t know how many times in my life those words have come back to me. And so therefore, I think that that started my resilience.

The principal recalled a similar professional experience as a beginning teacher that shed light on her beliefs of public education. Rosemary began her career 27 years ago in education teaching trainable mentally retarded children (TMR). As a classroom teacher, she taught grades 1, 2, and 7, but most of her teaching experience was as a

special education resource teacher looking after students from kindergarten through grade 8. Her interest in special education went “back to my childhood where we lived near a [hospital] and I did a lot of volunteer work” with young men who had multiple sclerosis. As an educator of TRM children, she had eight 5-and 6-year-olds. “From the time they arrived until the time they left, we did everything together, we ate together, and I had one instructional assistant with me.” The focus of her teaching was to integrate the wee ones. She remembered one particular parent night at which she presented the educational process for TMR children to the community. She said, “There was one gentleman who stood up and said he disagreed with it totally because he didn’t want his kids to get it [to get retardation].” The incident shaped her belief about public education, which she described as “educating children, it’s about educating the community, and how do you do that? You do that through building relationships.” As a leader, this grounding experience helped her transition many difficult times.

I remember the day vividly; I could probably tell you what he was wearing. I was shocked because I thought ... first of all, how could anyone say that, but how could they not know what this was all about? I guess that comes with being naïve and green and all those type of things. For me it was a big learning, and probably everything that I do, and to ground myself, I reflect back to that.

Knowledge base. Change introduced an expectation of processing information and acquiring new knowledge and skills. The growing expectations continued to shift the staff from teachers to learners. In Monica’s case, the new performance appraisal

process required her to articulate her philosophy of education. She admitted, “The one part I hate is they ask you about your philosophy of education. I don’t like being asked my philosophy of education because this is not my forte, but that’s the question that’s on there.” In general, philosophy was a negative experience for Monica, who said, “I’m not good at it, I don’t feel confident at it, and I don’t enjoy it.” The topic not only triggered distressing experiences of the past but also represented a gap in her knowledge.

In another conversation, Joanne recalled only ever having “one conversation related to philosophy of education” among teachers. She said discussion about teaching philosophy was an absent conversation, and she went on to say, “I’m going to have to think about that one a little bit more.”

As a member of the school-wide numeracy team, Gregory said, “I do teach math, but I’m not as comfortable in all of these other areas.” He also admitted to “having difficulty teaching *teacher-assisted guidance*, because we’re not specialists.” He said, “I teach physical education, and I’m a specialist in physical education.” He believed guidance was extremely important in adolescents but the “higher ups don’t feel that it’s as necessary at the elementary level because they brought it in and pulled it away.” Gregory disagreed with having to teach guidance but admitted it represented knowledge he had to acquire. He also discussed the growing expectation to use technology and believed it was “invasive that a parent should be able to email me,” but later confessed, “I don’t have the keyboarding skills.”

Ellen also admitted to “not growing in terms of my skills [computer], and I really need to probably get busy doing that, but I need time, and it’s probably not a

high priority.” She found it difficult to find a balance between learning new computer skills and other competing priorities.

Institutional Dimensions

Rules. Accountability expectations were responsible for a shift from informal rules to formal rules, and the push to generate control and transparency created tension. Increasingly, formal rules, written in the form of procedures, specified what teachers were required to do. Until recently, the procedure guiding the performance appraisal process was more informal, a process Monica felt was just as effective. The new, formalized process consisted of specific procedures and “an awful lot of paper work to fill out.” The shift to formal procedures meant that practices were expected to be more specific.

Monica, who was the first teacher at the school to go through the new performance appraisal process, felt caught between shifting rules. She admitted, “Since my evaluation, there have been two workshops on how to handle the language, the terms, and the process.” Monica said, “If I’d been able to see it, had workshops on it, and thought about how other people handled it,” the process might have been less stressful. However, she felt that the new standardized procedures and timelines “constrained the situation, creating a barrier to the true picture of anybody anyways, because of the tension and the inability to adapt.” She said,

One of the teacher’s greatest skills is imagination and adaptability and responsibility when you encounter things that cause you to change your plans, but when you’re in a more constrained situations, it’s very difficult to teach that way if you’re used to adapting, to being a bit more flexible. It was a

barrier to be forced to adhere to something and to teach according to a plan, an A to B kind of thing.

Informal rules were unwritten and often evolved through interactions over time. The absence of documented practices concealed inconsistencies between what was formally required and what actually occurred. As a newcomer to the intermediate division, Adelle confronted the challenge of deciphering unwritten rules. She described her transfer from the junior to the intermediate division as her biggest tension. She felt comfortable with the open, supportive culture of the junior division. She contrasted the more laid-back junior community where teachers “liked to try things” with that of the clear-cut lines of the “very, very different” closed intermediate division.

The norms of the intermediate division evolved from processes and practices that were built by a core group of teachers over time. The historical affiliation of the intermediate division with high schools kept the rotary system firmly in place, structurally distinguishing them as an entity unto themselves. Adelle said, “Their agenda-driven meetings allowed no catch-up period for anyone that was new,” and her curiosity was blocked with statements such as, “This is the way we do it, and you’re still the new guy here, so don’t rock the boat.” Adelle said, “When you walked through those double doors it was like a different school, it was a different place, it was a different culture.”

Teachers who traditionally defined their work through direct involvement with others described increased technology affecting direct interactions. Although the efficiency of technology enabled change to occur at a fast pace, it disrupted patterns

between staff. Technology subtly changed the rules by introducing asynchronous communication, which cut out opportunities to connect face-to-face. The fundamental shift increasingly isolated staff to individual spaces and ran countercurrent to the efforts of building relationships and developing professional learning communities. Staff meetings were one such example. The vice-principal said, “The staff meetings were business meetings, and this is where you sat down and talked about [operational] issues,” but explained, “We don’t tend to work that way anymore. Most of the business goes out through *chat* [internal automated communication network], where you can hash things out that way and not waste time.”

As data replaced dialogue in staff meetings, there were fewer social spaces for teachers to share issues related to their day-to-day practice. Lois “really wished they would get some of those half days to sit down with our colleagues and deal with the day-to-day classroom issues.” Ellen, who struggled with technology, said, “Communication now between everything and the board is all on *chat*.” These fundamental shifts in the rules of communication gradually restructured and redefined the work of teachers.

The push to standardize procedures also altered the rules. Increasingly, the need for data or specific information required the use of technology. Although the medium enabled the process of collection, it also restructured work. Thus, the functionality and precision of technology increasingly formalized and defined informal practices. Ellen felt overwhelmed with “all the computer work we have to do now.” She recalled the stress of missing the school year when the Ministry

introduced the electronic format of the provincial report card. For her, the increased push to use technology invoked earlier stressful times.

I remember the year. I think I came back from Australia, and there were a couple of things going on. There was a lot of big changes in the assessment and evaluation and using the rubric—so that’s probably 8 years ago. I’m not sure. When, of course, we started to use the computers for report cards, and I think we had been using sort of a modified system, but then the new report cards came out with all the strands and the boxes and the new curriculum. I remember, of course, the training and what we had to do plus a lot of changes, but the training—and being very anxious about doing all of that on the computer. Even as it began, you’re always kind of scrambling, and it did affect me physically.

Ellen admitted to not “doing as much or as well as I could be on the computer.” However, the growing expectation to measure accountability coupled with the pace of teaching competed against each other for her attention, energy, and what little time she had available to teach.

There are days when it is overwhelming, and in the computer lab [yesterday] it was. Yes it is. It was somewhat overwhelming. And I just thought, now I know why I’m not eager to be in here. Really, you don’t even have to be here, but you have to be in there because you have to get this mark and complete the expectations and strands.

A broader historical and sociopolitical context revealed the reality of shifting rules related to student accountability. Roger discussed ground-level perspectives

related to the change in teacher accountability: “When parents would come in, they’d want to know how their student was doing. Now they come in and want to know what we’re doing.” For him, managing rude student behaviour created tremendous tension and triggered similar experiences dealing with student behaviour during his tenure as federation president. He said, “I witnessed a lot, but most disturbing were two situations where teachers were accused of sexual assault and it was fictitious, and they just destroyed the teachers’ careers.”

Roger felt that the change in student accountability was connected to the introduction of the Young Offenders Act where “they [kids] can’t even be charged with mischief.” He said, “You just have to be so careful” when dealing with challenging adolescent behaviour. He confessed to being accused in the past by a young adolescent girl who fabricated the event. Despite being “support[ed] from administration [previous school] ... sometimes you just want to let it go away, or you don’t want anybody to know that you’ve been accused.” Although the incident was not documented on record, he said, “You have lost so much self-esteem and everything.” In Roger’s case, the shifting rules of student and teacher accountability created tension by exposing fear and insecurity of the past.

Inconsistent interpretation of the rules provoked tension. Mary considered her JK/SK class a split classroom instead of a blend as it was labeled by the Ministry. She believed the objective label did not diminish the fact that “you have 3-year-olds and you have kids who are almost 6. So, you’re programming to those children, and I get frustrated ... it’s a huge variance.” Mary also added that, even though the regulations that guided class size were technically within ministry standards, “a class size over 20

is ridiculous.” She went on to say, “The interpretation of class size with three severely Special Needs children in the class required more scrutiny.” She also believed the calculation was inconsistent with other schools and said, “because of the way that they figure it out, we’re at a higher income school, they are not capping us like the other schools. Many other schools are capped at 20.”

Resources. A decade of cutbacks, restructuring, and doing more with less meant managing change with fewer resources. Change often introduced complex and multidimensional requirements but without the necessary resources to manage them. Participants described themselves as dealing with insufficient, unfamiliar, or uncoordinated resources. For example, the new performance appraisal process consisted of challenging technical language and unfamiliar terminology. Without workshops, Monica found the 25-page form tedious and stressful to wade through. Despite her background in technical writing, she felt that the new forms were complicated and difficult to decipher. She personally added an interim step to “delanguagize the terms so that they were in my terms... to handle the vocabulary and reorganize in my own mind so it made sense to me,” which extended the process and added stress.

Monica said, “I suppose I could have referred to administration for help,” but finding the time prevented her because “they’re busy too, you have to find the time when they have the time too.” The expectations alone were extensive, but insufficient resource support created additional tension and busyness. She explained,

It took hours, hours, and hours. Because once you filled in the form, which takes hours, you have a meeting to discuss the form, which can take an hour or 45 minutes. Then you prepare your classroom for the demonstration lesson

that you have prepared and described and discussed with the person who is evaluating you. You make sure your materials and everything run as smooth as possible because you are being evaluated. It was all that preparation. Then there was the post meeting and you discuss what has been seen and where you are going from here. What suggestions or aids might assist you in the direction? That is a very supportive meeting, but it takes time but it was a very supportive meeting, but you have that process to go through twice when you know you're being evaluated. You would do the paperwork and be observed in November, you would leave it and then do the paperwork and be observed in April, it would be about a month.

Attempts to manage her large JK/SK class presented Mary with a number of resource issues. A lack of resource support meant facing all 23 children alone. She said, "At the beginning there was nobody, and then I was given an EA, and she is with my one little guy who pinches and kicks and is dangerous to the other children." By the end of the year, "a lot of support people came in as far as occupational therapy and physiotherapy, speech and language, which drove me crazy and didn't help at all." Instead of providing her the support she needed, "they [consultants] would come in and they would observe, and I was always having to do some special lesson and be on display," which added to her stress. Mary said she "probably had 18 people through the door this year" but admitted,

We've gotten nowhere with a lot of it; some helpful suggestions, but no one has co-ordinated, so it's all different people coming from different places, and sometimes it's contradictory, too. Sometimes one will come in and say, "You

have to take him out of the classroom,” and another will say, “You have to leave him in the classroom.” So, we’re getting all these different things, and finally we just throw our hands up and say, “I think we know what’s going on.” It really doesn’t help, to be honest.

Withdrawing valuable resources at a time of escalating reform reflected shifting ownership of change. Lois lamented fewer professional development days, nonexpert consultants, and poorer quality in-service workshops. She identified a general lack of dedicated resources and sufficient time as her biggest tension. In her view, the ownership of change shifted to teachers, but the infrastructure to support the change did not accompany it.

There’s always change, and they don’t give you the time to adapt to that change or to attend in-services. The change becomes your change directly. You’re responsible for making the change and for giving yourself the professional development you need to make that change.

Lois felt the quality of support had also changed. She expressed less confidence in consultant support because they “were wearing dual-triple hats so it’s very difficult for them to be experts in their field, and that’s where I think the breakdown occurs.” She contrasted the present support with previous models of support.

It used to be we had co-ordinators by subject, and particularly in grade 7 and 8 where you become a little more content oriented. That was helpful, that someone who had some expertise, whose job it was to look out there as to how science was done in other boards, programs that were available, resources that were available. And then they would sort through all this,

discard what was not useful in their perception, what might be useful, then meet with the teachers and give them something which was practical to their day-to-day teaching.

Her confidence in dealing with change in the past directly tied to the expert support she and her colleagues received during the process. For Lois, the idea of obtaining activities from other subject matter experts made her “feel energized and excited about trying something new.” She fondly reflected,

On professional development days at the time I was teaching family studies, I would go with all the family studies teachers in [the school board], and there was a family studies co-ordinator, and we would talk about what was going on in family studies in the province, people would come with specific ideas, classroom projects that would teach certain skills, tried and true activities, and you would exchange, and you’d dialogue with people teaching the same subject. You just felt supported because you had a co-ordinator who assisted you. It was always nice to know that if you were experiencing problems, other colleagues were experiencing similar problems. You could solve that, and then they took away family studies—it was a financial thing. Everything is driven by money, so the board began to cut back on professional development days because that was an expense.

Tension increased for Ellen the closer she got to report card time. A combination of limited and unstable computer equipment and nobody to troubleshoot at the school hindered her ability to manage technology and brought panic to her day.

Her situation worsened because of unreliable computer equipment at home, which compromised her skill development and trapped her in tension.

Every time report cards come around, there is always the anxiety about whether or not something's going to happen to your data. Some people have done their report [and are] almost done, and then they can't export them for some reason. Well some of it's the software, but it's the hardware—the computers. They make for anxiety-provoking times... I could access [my classroom computer], but for me it's not practical. So I do mine all on my home computer, which I had a virus on and it chewed up my internet. I was really worried about that.

Adelle worried about resources when she started to teach a different grade. She said, “I didn't know the curriculum at all” and consequently had limited resources available to her.

I didn't have any resources. I had built up resources in grade 3 and grade 5, which I had passed on to people to use since I wasn't going to be using them. I thought, What am I going to teach grade 7? Do I know enough to teach grade 7?

In Adelle's case, knowing whom she could ask was her biggest barrier for obtaining resources.

Leadership. Provincial legislation in 1998 removed principals from the teachers' collective bargaining units, thereby taking away their rights to strike and to collectively bargain through the teachers' union. The importance to this study was the structural division it created between members of the union and management. The

structural shift reflected the two divisions of labour that operated at the intraorganizational level and that affected teacher activities. Roger said he felt “better about [removing management] from the bargaining unit... now they can’t play both sides of the fence.” He said,

I remember a situation where a principal accused a teacher wrongly, and when we went to the Federation, the principals were in charge of the Federation at the time. And they said, “Well, that would be political suicide for you to pursue it.” ... So now that they’re out of the union, that situation won’t occur, because the union will go right after them.

Teresa recalled earlier days as a teacher when “administrators came along and walked the line in the late ‘90s during the strike. It was a very powerful political time.” As a vice-principal, she disliked the separation and believed it created adversarial relations between management and union. She also believed relations “won’t be settled until we are all on the same team, and the only time it’s going to matter is when somebody’s collective agreement is violated.” Often in her role as vice-principal, she confronted the divide head on. She described the difficult experiences negotiating small internal changes because “unless you get 100% of the people on side, procedural changes are prohibited.” One such unsuccessful proposal was a recommendation for a 5-minute change to the start of the school day. In this circumstance, Teresa said,

No open discussions between staff and management occurred because it came down from the union. When the union said you have to do this, you have to do this, because if you don’t then there would be grievances to deal with.

The invisible line between union and management kept key assumptions between staff and administration underground.

Mazzie confronted the line while clarifying the confusion about her surplus notice when she learned her “job would go to half a job, basically no job” because she was considered part of the gifted program, an area she had not been in for 3 years. Mazzie admitted, “I didn’t feel she [principal] was going to come back with that response, so I certainly expected backing from her on it.” She was confident because “I knew I had support with the union,” but at the same time she felt disappointed and disillusioned about her relationship with the administrator. She said, “She [principal] was there for one more year after that. She was fine, but I just felt whatever relationship we had did not exist anymore. I didn’t trust her anymore.”

Adelle also saw divisiveness between some intermediate staff and administration where staff say, “This is us and this is the office.” She said, “Some teachers feel that they really need to deal with things on their own. They don’t want to go to the office.” Her perspective was that “principals and vice-principals used to be a part of the teaching union and they’re not anymore,” which Adelle believed began when the new performance appraisal process started. She said,

It [performance appraisal process] created a lot of stress ... what you may have gone and asked before in a casual, open way. If this is my evaluation year, and I’m not going to ask that question because it may look like I don’t know what I’m doing.

Adelle believed the fear of seeking help from the office was a strong deterrent for some intermediate division teachers.

Summary

The identity of teachers was the foundation of thinking, behaving, feeling, and relating with students, parents, colleagues, and administrators. Identity informed how participants viewed themselves as professionals. Professional identity influenced actions and taken-for-granted points of view characterizing teaching standard, life and career stage, and history. These personal dimensions and patterns formed standards and guided practice and routines that were comforting to participants. These familiar patterns and the values and beliefs beneath them stretched to accommodate change that generated tension among personal dimensions and various institutional dimensions. The momentum and uncertainty of change exaggerated these disruptions and triggered emotions that influenced how participants made sense of their current circumstances.

An Interpretative Perspective of the Context of Tension

The context of tension was multidimensional in nature, with tension emerging in three sites: *culture*, *character of change*, and *dimensions of change*. Although the study focused on a personal level of analysis, salient features at the interpersonal and institutional levels were important to appreciate the complex activities altered through change. As shown in Figure 3, all three sites interacted with each other to influence tension and explained why teachers and administrators responded as they did. The split arrows represented the inherent contradictions between sites. Collectively, these sites shaped a holistic context of tension.

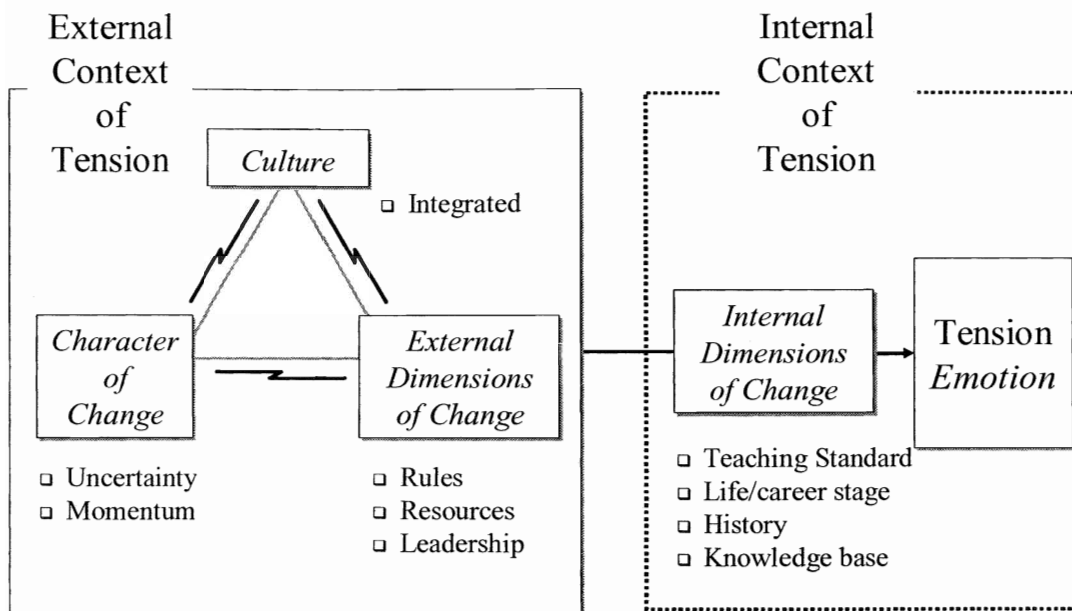


Figure 3. The context of tension.

The broad political factors of reform shaped *culture* at the school board level and made instability salient. Despite the turbulence, the board worked hard to maintain a reputation of progression and innovation. Their recent initiatives focused energy and attention on increasing centralization and towards one integrated, system-wide educational organization. This integrative strategy was a student-centered, systemic initiative designed to enable and support accountability efforts and the development of broader professional learning communities. As these change initiatives filtered down to the school level, higher expectations for staff and school development accelerated the pace. These external expectations inserted different structures, resources, technology, and rules for teachers to learn that were often in conflict with the procedural patterns and ways of thinking currently in place. The school-wide focus demanded a shift of teacher affiliation from individual learning to a broader vision and collective learning. This shift coupled with the fast pace and partial definition of change initiatives affected the *character of change* and placed higher demands on school personnel.

Uncertainty and *Momentum* characterized change at the front lines where teachers and students interacted. Partially conceived and even ill-defined school changes created uncertainty and caused teachers to brace themselves to deal with ambiguity and loss of control. The unpredictable nature of change triggered high levels of tension and forced people to focus on the present and away from the future. The pace and volume of change not only added workload but also created a sustained instability that affected productivity, competence, and confidence. The pace also

exaggerated the natural stress points at various times of the school year, compressing time and space, which led to higher levels of tension.

The *Dimensions of Change* were those personal and institutional elements altered through change. The personal dimensions were identity, teaching standard, life/career stage, history, and knowledge base. The institutional dimensions were rules, resources, and leadership. Alterations in these dimensions were conditional in the sense that the various contextual factors operated differentially to influence tension. These alterations created contradictions or conflicts within and between dimensions of change, thereby causing tension. The pace, uncertainty, and volume of change, as well as the culture where dimensions exist, also influenced tension. As teachers and administrators responded to tension, their ability to restabilize was influenced by both the personal and institutional context of change.

CHAPTER FIVE: MAKING SENSE OF TENSION

The context of tension was complex and shaped by many factors, both internal and external. Understanding the complexity helped me to interpret how teachers and administrators responded to tension. The responses participants had to tension tied directly to the context in which it emerged and subsequently influenced how they were able to manage it. The central findings revealed two main responses, resistive and generative. These two main responses were sufficiently broad and abstract to relate other strategies to them, which are explained in detail in this chapter.

Chapter Five presents the various ways that participants responded resistively and generatively to tension. It also presents a third finding associated with shifts in contextual factors that helped participants move from resistance to generativity. The chapter is therefore organized around three main sections: (a) resistive responses, (b) generative responses, and (c) shifting contexts: from resistance to generativity. The final section of the chapter presents a theoretical perspective of making sense of tension.

Resistive Responses to Tension

Resistive responses reflected various strategies participants used to cope with tension on their own. These personal responses involved isolation from others and, in many cases, allowed participants to secure time and space in order to process information and emotions alone. Resistive responses, characterized as closed, individual, and internally focused, meant focusing on the present to avoid “one more thing to do.” Participants described tension associated with resistive responses as never ending. For those who required reflection to assimilate information, resistive

responses were strategies of finding time and space to do so. Resistive strategies involved progressive degrees of disengagement, which included *shutting down*, *withdrawing*, *giving in and giving up*, and *escaping*. *Collective resistance* emerged as an interesting strategy whereby groups rather than individuals responded resistively.

Shutting Down

Shutting down was a response to being overwhelmed and the cumulative effect of pace, volume, and uncertainty of change. The response was an immediate reaction of disengagement to stop processing. It involved isolation from others, and the detachment provided relief and distance from further demands. Shutting down was usually temporary in nature and served to contain escalating feelings of tension. Lois described being overwhelmed in situations when “too much information was [introduced] too fast.” She described shutting down as reaching a point where her brain shuts off:

When you have too much to do and you are overwhelmed, I think the tendency is to do nothing. You avoid, as opposed to tackling something. It is not that you cannot tackle something that is challenging or new; it is just sometimes there are just too many things to do at the same time. That is where I get back to what I said before, that they keep implementing all of these new things, but they do not deal with what they are taking away over here.

A particularly challenging situation involved managing various disruptions related to competing expectations. These situations appeared more common for some participants. What made them particularly challenging was the inability to adapt to the unexpected situations that altered plans. Ellen described a break point when

broken computer equipment and escalating student behavior prevented her from completing a planned lesson. She said,

The students just exacerbated ... makes my frazzledness only get worse. I had to send some of them [students] out. I have to have a break; you have to have a break because there are too many other demands from all the students in the classroom and the computer lab.

Shutting down also occurred in situations where mandated changes were ambiguous. One of the implications of dealing with ambiguity involved handling uncertainty and the unpredictable nature of situations. There were inevitable reactions to situations when information was disseminated incompletely or at inappropriate times. Lois, who assimilated information logically and needed to see it sequentially, described the experience of dealing with the implications of processing information at the end of the school day.

Optimally, don't give it [new information] to me at 5:00 at night. Change is often hoisted upon us at 4:00, at the end of the day, when your mental abilities are not at their prime and not at their peak. So the time of day and I think the situation where information is presented also affects how you process that change. Sometimes you just ... your brain says, "I don't care." I don't understand it. If they can't explain it to me, the heck with it. So, the avoidance, I'm not going to do it. I don't want to do it... I want to go home.

Another teacher, Monica, described her fear of being asked the meaning of her philosophy of education. She said, "The walls went up" as experiences of past failure invoked fear and anxiety. She went on to describe her initial response as, "Oh, no, oh,

my God, don't do this to me, not this year... how am I going to get through this? I don't want to do this.”

Another teacher revealed the insight of her initial strategy when shutting down. She explained sustaining commitment to mandated changes meant “shutting down at the point where it [information] makes sense to me.” For her, shutting down at a particular point enabled her to reengage. She went on to describe her preference of assimilating information.

If I can see the logical sequence in how step two builds on step one and how step three builds on step two, I will continue to process the information. The minute it starts getting out there or the sequence is broken and it doesn't make sense, whether it hasn't been explained properly or whether I've just reached my intake maximum, then I shut down.

Together these comments indicate the first level of teachers' responses to being overwhelmed.

Withdrawal

Withdrawal differed from shutting down in that withdrawal secured time and space for reflection to process information and emotions, whereas shutting down was a temporary disengagement that stopped processing. Withdrawal meant participants disengaged longer than they did when shutting down. In situations where information related to change was not aligned with learning style preferences, participants withdrew to reprocess it. Withdrawal provided them a quiet context for reflection to calmly sort through information, translate it, and assess how to proceed. It meant

finding time alone to regroup and reassemble information according to individual ways of learning.

Lois, who was a logical thinker, said she had to withdraw in situations when information was confusing or incomplete because

usually I need time to regroup, and then need I need time alone and time to think about it because at first you just say it's too much and you walk away. Then you realize you have to do it. I need to problem-solve in my head, to come up with a way. When you are overwhelmed, you sometimes have to withdraw.

Withdrawing allowed Lois time to organize information in ways that made sense to her, which enabled her to formulate questions and solve problems.

Okay, what do I need to learn first? What don't I understand about this task? And then try to fill in that brick. It is like building a wall. You need to have each of the little bricks as you go along.

Monica, who was the first teacher at the school to complete the documentation associated with the performance appraisal process, described the experience of sorting through the complicated terminology. She said, "I had to deconstruct it [the language] and gauge it on my terms. I don't think I'd turn to anyone for help. Sometimes that creates more tension." Withdrawal allowed her a private place to decipher the new terminology and pull it apart so she could find a way to proceed on her own.

At the height of Teresa's uncertainty about whether to apply for an administrator role, she withdrew to reflect on her decision. In her case, withdrawal

rewarded her uncluttered time to calm down and reflect upon an important decision.

She recalled,

I just stopped; you know summer came and I did not take any courses that summer. And I actually could have taken one more course, but I didn't. And once I sort of calmed down, I thought, why was I doing that? Why was I in such a hurry? Then the following year, I went back to school in the fall and I told my principal, who had been my mentor, I said, "I'm not going to do it."

For Lois, withdrawal granted her solitary time to gain confidence, control, and ownership of a process. Taking the time to connect with the information alone enabled her to approach change in a meaningful, manageable way. She said,

I'm a list maker, I need to see things chunked, sequential, and in linear fashion. I start to take control back, as opposed to the control being someplace else, someone else making decisions. Then I sort of say, "What can I personally do to develop my skills without overwhelming myself?"

Lois went on to explain that withdrawal allowed her a context to reflect and to "organize the details and facts in my head" where

I needed to get away from it. I need to be able to synthesize things and mull it over in my head and to think about it. Sometimes that leads to the stomach problems because you are feeling the stress, but once you sort of begin to make sense of it, or you make a list of how you're going to tackle it, the stress reduces. The tension reduces and the frustration reduces.

Withdrawal manifested in other ways as well. For example, withdrawal bought time to procrastinate. Monica, who disliked change and avoided situations that challenged her teaching practice, explained,

I have to be in the situation where I have to do it before I'll change.

Otherwise, I take small, small steps. I'm more than happy to learn a new computer program, I'm more than happy to learn a new approach to technology, but when it comes to a change in the way I teach, I have to be pushed ... push me off the cliff, say, you have to do it today.

Withdrawal also involved disengaging emotionally and gaining isolation from others. It implied difficulty with disclosure and trust. Monica, who avoided disclosing the fear, anxiety, and worry she felt throughout her performance appraisal process, described her experience.

It brought that [failure] back. It was fear of failure, fear of being judged, and fear that you will be so unsuccessful that you will have to leave your school, your area, your job. I am very less likely to discuss how it is making me feel or what I'm afraid of ... please don't ask me to bare my soul about my fears.

You, I don't mind, you're not a teacher. Don't ask me to tell you about all my failures if you're a teacher, but if you need some help, I'll be there to help.

Monica said she "would probably keep that [next performance appraisal] private, too." She admitted she felt insecure and "never felt like I'm doing a good job" and went on to describe her private war dealing with tension.

It's my self-confidence or lack thereof, more than professional identity. The tension is wrapped around my professional identity, but it's my personal self,

lack of self confidence. Yes, my personal self, lack of self-confidence attacks my professional identity, and the lack of self-confidence consumed my energy.

The principal, who found it difficult to accept emotional support, explained her theory about it. “I always have to be putting something into the emotional bank account; you reap the rewards from it.” Despite her belief, Rosemary felt, “when you’re going through tension for a long period of time, that’s hard [to put into the emotional bank account] and it involved getting past your pride.”

The vice-principal (Teresa) recounted her experiences of tension and the emotional tug-of-war she felt.

You feel things pulling, and things are tense when you pull. I don’t know whether it’s your heart and your stomach? Because your stomach is all part of that ... butterflies and everything. Or maybe it comes from your head down too, but there is pulling. There’s two different directions pulling.

Giving Up and Giving In

Giving up and giving in differed from withdrawal in that it offered little opportunity to reflect as participants coped with competing demands, whereas withdrawal secured time and space to reflect. Giving up and giving in occurred when a person plummeted into tension and disengaged further from others. It meant managing each day as it came and reflected the struggle some felt when trying to manage one more demand. The defeat of trying to get ahead meant constantly fighting against time. Over time, the struggle against time reduced capacity and made it difficult to see beyond the present. This space was energy consuming as daily

attention focused on managing multiple stressors, which left little time to consider other goals.

Gregory, who announced he had 4 years until retirement, explained the experience of dealing with escalating tension.

I feel that I've got another thing added. I'm making my way up the mountain, and I've gotten to a certain point. And then it's gotten higher before I managed to take some stuff off of it. It's almost the feeling of, gee whiz, I'm never going to get ahead. I'm never going to accomplish what I've been asked to accomplish before I get something else. And it's the same thing in teaching day-to-day, like it just seems to just continue and continue and continue. And it's too busy, put it that way. Very busy.

In circumstances of prolonged tension, participants shifted their standards in order to keep up. Altering their own expectations was an approach to rationalizing a shifting professional identity. It meant they did the best they could. It also meant focusing on each day as it came rather than being able to tackle any other goals.

When asked how Gregory moved himself out of tension, he replied,

I don't think you get out of it. I think that you put your professional hat on. It's your job; you go and do it, and you do it to the best of your ability that particular day. And then some days, you have better days than others and you feel better about yourself, or some days you knew you blew it and you go, "Well so what? I don't have any experience here." I have to admit I never went to any in-services or anything like that for the year that I taught science class.

For another teacher who admitted surrender to tension, giving up and giving in provided temporary relief from the struggle. It granted permission to shift his standards and settle on middle ground, a place between old patterns and routines and new expectations, by “doing his best.” One teacher described how he managed while teaching a new subject.

Number one was to survive, okay, needing to survive. And survive means that you provide the best you can do for the kids, so they’re getting an adequate education, or a good education, okay? You’re meeting the expectations.

Number two was to—you’re always concerned that the program that you’re delivering is what you’re supposed to be delivering and it meets the parent expectations, because the first thing you don’t want is people coming down on you, okay?

In another situation, Mary had resigned herself to doing the best she could while struggling to meet the immediate needs of her students. She described one particularly difficult period “the first few months [of the year] when it was just brutal” as

surviving the tension ... I find you’re at a different level. It’s like when people get angry and it’s so emotional that you’re really not thinking. You’re really, like I’m trying to do my problem solving, what I need to do to kind of alleviate it [tension], but if you build up to a level of frustration and it’s inside, you’re not really as clear with your thinking, you know? So I’m just trying to just go about what I need to do.

In some cases, the battle against time meant exchanging standards for competence. Lois went on to talk about the difficulty she felt having to alter her expectations while being forced to change. She said, “There’s just not enough time to take something and digest it, work it through, then get feedback, then perfect it, or modify it towards a perfection stage—a competency stage.” Similarly, doing his best was how Gregory managed a new split classroom situation. He described how he rationalized his efforts to accept middle ground.

Taking on a split class was a stressor. I managed to work something out. I’m doing the best that I can do. I’m not doing the best, like somebody else that’s been doing it for years, but I’m managing. The kids are getting a good quality education.

For some, the reality of getting through the day-to-day was consuming. Thus, giving up and giving in often reflected a place where time and space compressed. For some, like Ellen, scrambling to keep up left little time to develop the necessary computer skills to get ahead. She described the experience of being trapped between escalating tension and increasing demands.

You’re in a situation like yesterday when you’ve got to change. You’ve got to change your plan; there’s certainly a challenge there to, I suppose, to change, and then the tension is there. I have to change and figure out what to do ... okay, go on to the next lesson and some students get that just fine. Others don’t know what to do and then they start acting out. So, it’s [tension] is a mental function as well ... I try not to panic. What do we do? What do I do with them now?

For some, giving up and giving in over time meant escaping to avoid another stressful situation.

Escaping

Escaping differed from giving up and giving in in that it meant disengaging completely to secure an alternative context, whereas giving up and giving in meant staying in the tension. Escaping occurred when the prospects of the future were grim or in situations where few signs of relief were in sight. It often reflected high levels of job dissatisfaction as well as feelings of incompetence. Escaping always involved weighing options and meant taking control of an unstable situation.

Gregory remembered the stress related to an annual teaching assignment where he faced the prospects of teaching two new subjects. He admitted the idea of teaching new subjects had him looking for another job. He said, “For the month and a half, it was awful. I didn’t want to do it. I was looking at the ads for a new job right up until the final day of school.”

The constant cycle of internal changes along with external changes made it difficult to grow and develop as a professional. Gregory, who lacked proficiency in science, said the idea of moving to another grade or school appeared to be a better option than facing another stressful year. He explained,

You don’t get a chance to build on it [knowledge] ... “do I really want to do this or is it easier,” and I’m using the word easier, to look for something that I’m already doing and I could just take what I have and move on.

The price of escaping was often high. Joanne explained how difficult a decision it was to leave her previous school because it involved weighing her needs against values.

I should have left [her previous school] in June, but leaving in the middle [of the year], it was hard, but it had to be done... not doing it would have maybe cost a little bit more. For them [other teachers] their needs are high, and for me my values are high. And some of them, they'd rather—it's like the devil you know rather than the devil you don't know. And they say it, and they can handle it. Maybe they are putting it—tucking it somewhere else, but for me, it was just eating away at my soul, who I was as a person. I couldn't be myself there and truly feel good about being there.

In another equally challenging case, escaping meant making difficult decisions without all the facts. It meant weighing uncertainty against possible regret. Mary described the regret she felt while contemplating a grade transfer.

When is it going to happen? I keep thinking, well, if I go to grade 2 or 3, because it's just not going to happen, then I think in the back of my mind, we'll watch them do [lower class size] and then I'll regret it and, so, yeah, I'm constantly thinking about that.

She went on to talk about the costs of leaving a great teaching partner behind.

I would stay there full time if I had Susan [teaching partner] though or someone like her, well Susan, she's great. If they brought it down, if it was just 17 in each class, because you're dealing with sets of parents, too. If I go to 2 or 3, then I'm dealing with a new program, so there are some things to

weigh and it may not be my choice, then I would stay in kindergarten? If they stay at 23 or 24 or 25, I will apply out of the school. I will not do it. I just couldn't. At this point of the year, you think, "Oh, I can handle it," but then you have to go back and think about how it was in September. So I wouldn't. I'd have to go somewhere else.

Even though her decision to transfer invoked painful experiences of the past, her earlier resolve to put her family first provided her the energy to cut her losses and leave.

Collective Resistance

Resistance also occurred collectively. Similar to other resistive disengagement responses of isolating emotionally, collective resistance reflected the emotional disengagement of a group. The response often presented itself through silence. Suffering on a collective scale was akin to a conspiracy of silence or unspoken agreement among people. It sometimes reflected subgroup behaviours and perspectives that varied from the administrators in the school.

Teresa recounted her first experience as a new vice-principal at a staff meeting where she confronted silence. She said,

The ones who do not want to do something would voice their concerns, and everyone else watches in silence, and you kind of look around. But you know that's not all of them, just some of them.

Joanne, who reflected on why teachers rarely discussed teaching philosophy, shared her perspective about the absent conversation.

They [teachers] get out there and they do not want to know anymore. They think they know everything, and I think when you further your education you realize how little you know—not every teacher is a learner.

Gregory, who believed teachers feared repercussions, described his perception about disclosure.

People don't speak out as much, and people do not speak out against what's being done and being said and that sort of thing. They are feeling it; they are talking amongst themselves, but they don't speak out as much as they should, and it's hard. It's hard to speak up—you've got to do it in a private way. Yeah, there's a definite fear that you could end up with the worst assignment ever, the assignment from hell.

The uncertainty of the annual teaching assignment process meant Gregory kept his feelings in check and elaborated on why he thought other teachers resisted.

I really don't know if people have the guts to do it [be open about fears]. I think teachers are afraid of repercussions. I think it goes back to what your assignment is—if you know that the ultimate is that the administration has a hammer in terms of what you're supposed to be teaching ... when it comes every year, to be filling in all these spots, if you've balked or if you presented yourself negatively, or you had a conflict or whatever, you know darn well, we'll get you.

Monica, who spoke about her lack of disclosure, discussed the expectations she had of herself.

Although I was more than willing to share my enthusiasm about the reading writing workshop, I think there's the fear of not being able to handle the stress of evaluation. So there's a certain level of expectation you put upon yourself. I shouldn't have a problem with assessment because "I'm such a great teacher," so I'm not going to share my fears about assessment in front of other people because I'm not supposed to be able to not handle that, that's something I should be able to snap at my fingers.

Suffering collectively often presented itself through silence, but for some the behaviour was transparent. Joanne said, "You can see them [struggling], their whole body language—you can see their body language." In her mind, collective resistance was unhealthy and she related it to the experiences at her previous school. She said, "It was toxic and still will be when he [principal] leaves, because the same nucleus of individuals are there."

Generative Response to Tension

Generative responses reflected various strategies of engagement with others. They were interpersonal responses that involved reaching out to various support systems to obtain information, feel validated, or engage jointly in problem solving. Unlike resistive responses, generative responses were open, connected, and externally focused. Those who responded generatively defined tension as finite. Framing tension in this way helped participants to envision an end and to look forward. Teresa said, "You do know that life will go back to normal at some point," which helped her stay focused and concentrate on dealing with it while moving forward. Generative responses were strategies that engaged others and involved connecting with others,

risk-taking, and decision-making. They meant a person felt supported, not alone, when transitioning through turbulent times.

Connecting With Others

Connecting with others involved dealing with tension collectively. It meant tapping into a support network for support. This response reflected the extensive support network teachers and administrators relied upon day-to-day. Connecting with others provided opportunities to reach out to entrusted colleagues in order to validate feelings, collect information, laugh, or settle insecurities. It was an interpersonal strategy of engagement where discussions, planning, and problem-solving were shared. Roger described feeling worthless and incompetent about his ability to deal with rude student behaviour. He said, “It weighed heavily on me until I started talking to other teachers. Just knowing they had similar experiences made me feel less alone.”

Connecting with others was also a way to gain emotional support from colleagues, parents, or partners. Mary described the emotional support she received from her teaching partner and her husband. “He’s [husband] my one at home and she’s [teaching partner] here.” She went on to explain the benefits she reaped from others: “The very supportive parents who are always making nice comments and they are very supportive. They come in all the time and volunteer in my room; they have become like friends.” Mazzie also turned to others for emotional support. She said,

I believe just talking to others. I think my husband—when I was offered the 1-7 split, even knowing just from people like [Sandy] and [Bette] saying, “You’ll

be fine. You can do it just fine.” So I think just from support and verbal support that I knew I could do it.

Surprisingly, the concept of team was different from expected. Most participants named one other person as their team rather than a formal group to which they belonged. The concept of team reflected both functional relationships and relations based on people sharing common personality traits. Mary said that what really helped her with tension was having a “great teaching partner because we talk every day at the end of the day. We laugh at stuff that has happened.” She went on to explain how important her teaching partner was to her daily teaching:

I look for a teaching partner that I can work with, someone who you plan with, someone who you’re just a team. And that makes a huge difference. At [previous school], I had this friend, who’s one of my best friends now, and we taught together. We were actually hired as a team at [previous school].

The relationships teachers formed with colleagues were the basis of practice partnerships. These connections offered them a place to share ideas, work out stressful situations, and gain support on a daily basis. Mazzie said, “I have a great support network, and in tense situations, I don’t let things sit.” She identified two individual teachers as her team and explained that the relationships developed because they shared common personality traits. “We get along great, and we make each other laugh.”

For some, the connections were ways of seeking guidance. Relationships with mentors provided safe but legitimate places to learn from another colleague or

someone seen as strong enough to advise. The support and encouragement Gregory received from a colleague reduced his level of anxiety.

But knowing the program and knowing what's going on, it was just, oh man!

But I had a mentor ... so if you had somebody strong that you can go to, you can get through the program. We had it set up in a way that all I had to do was follow her tracks—you're going a little easier. You're being massaged in there.

You're not left on your own, so teamwork plays a lot.

Gregory considered the entire intermediate division as his team. He said, "If we have a problem or we want to do something together, or we are working on the same unit, that sort of thing. We bounce ideas off each other."

In another similar situation, Lois believed even brief connections with colleagues helped validate her feelings and perceptions of change.

Sometimes your stress can reduce when you're walking out to the car and 15 people are saying this is the stupidest thing. And you realize that you're not suffering alone. Your perceptions are confirmed by other individuals ... they're having as much difficulty. So I think if you connect with other teachers, it can be helpful in that if someone has the expertise, they can point you in the right direction, and that's all part of sorting through and assimilating the information and deciding how you're going to tackle it.

Lois explained that colleagues helped her solve problems. She said, "If it weren't for your colleagues, if it weren't for your support from one another, it would be impossible." She described the experience of a mentoring partnership.

I'm walking Adelle through the math program this year. I teach her how to teach it. She guides me through the language because I haven't taught language for about 10 years. With the focus on literacy and the reading continuums and levels, it's different than it was. So she's been mentoring me on that, and I've been mentoring her.

Lois said she felt collegial support was superior to administrative support. For her, the most important source of support day-to-day was the help teachers gave one another. She said the stressful realities of teaching required specific, targeted support. She believed that "administration spends too much time doing nothing that benefits us in the classroom; as far as I'm concerned, the consultants need to get back into the classroom so they can get in touch with reality."

Adelle believed that collegiality and good interpersonal skills helped her transition into a new culture. Her approach in uncertain situations was to ask questions, and she admitted she had no problems disclosing gaps in her knowledge base.

I think that's a strength, and I've always been the kind of person that if I don't know, if I've got anxiety about something, I get to the point where I think, okay. What do I have to do to relieve that anxiety? And it's usually that I have to find out something, it's usually a piece of information that I don't have, and as soon as I can clarify, even if it's a huge task, as long as I can see what the task is, then I can break it down and I can work through it piece by piece.

Connecting with others was new for Teresa. Her usual approach was to “listen to my own inner voice rather than talking” to others. She said the change in practice related to her experiences as a vice-principal.

I’ve got a lot more colleagues that are in leadership roles, who have been through this process, who are going through this process, who are running this process, who support me, so I can go to them?

One accommodating teacher assisted Adelle to socialize in a new division. Adelle said the connection developed into a relationship that offered safety and support.

I could go to her right away for any questions and that I would bounce things off of her and that kind of thing. So, I think that that was kind of my wedge in, and then from there I would say, “I don’t get such and such.” She’d go, “Oh, it’s an intermediate thing.”

Connecting with others meant stepping out to ask questions, which at times involved taking risks.

Risk-Taking

Risk-taking differed from connecting with others in that it involved seeking out challenging ways to meet goals, whereas connecting with others involved the initial steps of inquiry. Risk-taking often meant interacting with power structures, handling conflict situations directly, and not being afraid to ask questions. One of the implications of dealing with tension was handling uncertainty. Those who took risks appeared unencumbered by fear and were able to deal with a certain degree of ambiguity. Risk taking was influenced by previous successes, both personal and professional, or through leadership endorsement and support.

As a newcomer to the intermediate division, Adelle described the benefits of having an ally when taking risks.

I think that way I know that at least there is one person that's going to back me up if I decide to take risks. If I go forth with something, there is somebody else that is going to say, even if she did not agree 100%, she would say, "Good for you for trying."

Adelle also talked about her perception of why other teachers were reluctant to take risks.

There is still that big thing in intermediate [division] ... I need to know. I need to look like I know, that I'm professional, and that I understand my thing. People worried about what the perception of their capabilities are going to be if they ask questions. I'm just a question asker; if I need to know, I'm going to find out from somebody.

Adelle explained risk-taking helped her move through tension, which enabled her to reach her goals. She felt asking questions helped to proceed independently through change.

If I can find the information, if I can understand the whole task, I'm much more able ... I will go on anyway. Once I say, okay. This is where I need to get to, I will go on and work towards that anyway, but to remove the tension, to remove the anxiety, the more information I know, the less anxious I am about doing it.

The principal, who credited a previous leader with her ability to take risks, described her experiences as follows: "I give her [principal] a great deal of credit because she

had such faith in my ideas that I had and suggestions; she was a great listener and always willing for me to take a risk.”

Risk taking also involved dealing with the implications of conflict. It involved dealing directly with others in situations of difference. Joanne, who tackled issues head on, believed the normal approach to handling conflict meant “people actually avoid conflict; they avoid talking about the issue.” She went on to describe the experiences of dealing with conflict and the potential consequences.

I just deal with it. They [other teachers] felt uncomfortable, but at least it was out there because then I walked away and said, “Okay, I said what I had to say, and if I’m not liked, well, what can I do about that?”

Joanne said, “Once people know who you are and you are a decent person and you’re not out to hurt anyone, then people come on board over time.” She described her approach of dealing direct as, “I just go to them and say, I’m having an issue with you,” which she believed was contrary to the norm, where “[other teachers] want strength in numbers.”

Agonizing over a surplus notice forced Mazzie to deal with conflict directly despite her preference to avoid it. She described her preference of handling conflict as “not liking conflict and would do whatever I can [to avoid it].” She went on to describe the dilemma she faced to clarify her surplus notice.

I had to look out for me. I went to the union because I needed to find out what I was entitled to, but my administrator had given me everything ... but I didn’t feel supported or backed from her [administrator].

Another teacher believed stirring the pot was necessary because she believed change involved conflict.

There have been some conflicts, and in those situations, I can feel my stomach go again [tension], whenever I have that confrontation. As long as things are going well, I kind of roll with it, and I'm not afraid to stir things up a little bit to effect some change.

Decision Making

Whereas risk-taking was one component of the decision-making process, decision making involved independent problem solving, critical thinking, and reflection. It also involved choice and selection between different practice options. For some, the decision-making steps consisted of interpreting, analyzing, and choosing among competing strategies. It also meant assessing what to let go of in order to move forward, which meant making trade-offs.

A challenge for virtually all participants was dealing with time constraints. Adelle believed "it all does come back to power ... self-empowerment." She recounted the experiences she faced dealing with trade-offs.

Do I have the power to do what I want to do? If I don't have the power, what pieces am I missing? What am I willing to let go of to get to the next step? Because I think a lot of times we have to let go of something before we can move on. Letting go is the scary part. That is part of the risk: not only finding out information but letting go of something. So if I have something that works really well but I want to try something new, I can't do both. I only have a certain period of time ... what am I going to let go of?

Adelle believed it was essential to let go in teaching today. She explained that being able to let go was essential, and “that’s why a lot of times teachers feel overwhelmed with teaching, because you keep getting new, you keep getting new, you keep getting new, and you have to be able to let go.” The principal explained how important decision making was to the practice of teaching. She said it was particularly critical to know when to let things go.

I know teachers are working hard and trying their best, and I just would like them to dig a little deeper into the craft of teaching, to be able to let go of those things that really don’t make a difference and try more things that do make a bigger difference.

The vice-principal spoke about how helpful it was to frame tension to define a beginning and an end. Teresa believed that framing tension helped contain it and allowed her to visualize it as an interruption.

The biggest thing is to recognize that no matter what the tension is, whether it’s something that you are deliberately doing and preparing for, or whether it’s something that comes along out of the blue, like a death, something with your kids, you have to know that it’s all consuming right now but there is an end to it. There is always an end to it, and you have to recognize that because if you don’t you’ll drive yourself crazy.

Decision making meant defining the parameters of a decision context. Teresa, who viewed tension as a hurdle rather than a barrier, sketched the parameters loosely around tension. Mary expressed similar sentiments: “Tension was so much less [at the end of the school year] because you do see an end, and it is just easier.” She said that,

despite the tension, she “learned a lot over the year ... how to handle certain kids- with one little guy who had anxiety attacks, I just say, “stop.” Normally, I would not talk to anyone quite so abruptly but that is what works with him.”

Rosemary talked about the competing stressors of closing a school and the experiences of decision making. She said, “Knowing I have done all I can and it’s reasonable and it’s revolved, then I just say, “Well, I’ve done whatever I can.” She discussed a particular problem-solving model that helped her succeed.

What is the issue? I am going to try these things. In trying these things, what was the outcome? What’s the best outcome? When I use that, then it does help me put aside my biases or that personalizing thing. That is one way that I get past it. I can say I’m not always right and maybe they are right, but because of all of these other factors, this is the way that it has to be. And so I can accept it. I then move on and let go of things that really don’t make any difference and try more things that do make a bigger difference.

Rosemary explained her strategy in more detail.

I compartmentalize issues to avoid feeling overwhelmed. I really do that [compartmentalize] a lot, and saying, “Yeah, this is an issue and it’s not resolving but it needs to go over here and I need to park it.” Choosing and being able to prioritize is certainly a skill that helps you through those muddy waters and turbulent times, but I think day-to-day you need to do that.

Mazzie said being resilient helped her make decisions. She said, “I bounce back pretty well,” which she said enabled her to move past the feelings of betrayal with her administrator. Adelle, who had faced adversity in the past, described

resilience as a catalyst that helped her through difficult situations. She said resilience helped her visualize the various options involved with situations.

If I can make decisions for myself and really know where I want to go and what I want to do, then that will give me the stamina that I need to get through whatever it is along the way. For me, that is what resilience is. It's having a very clear picture of what you hope to get to. Now you can change along the way, and I think that learning is always a cycle that you say, "I'm here; this is what I'm going to do; how to effect it; what do I do now?"

Summary

Overall, the internal and external contexts of tension influenced participants' responses to tension. Resistive responses represented various forms of disengagement where participants isolated themselves from the external context of tension. The results showed that disengagement fell on a spectrum of detachment, but in all cases the responses reflected ways that participants coped with high levels of tension. Generative responses represented various forms of engagement where participants connected with the external context of change. Generative responses also reflected different kinds of skills that participants used to seek information in order to move towards their goals. These response strategies served as opportunities to encourage learning and enhance practice.

Shifting Contexts: From Resistance to Generativity

The findings showed that responses to tension were complex. Responses were influenced by internal and external contexts of tension and did not occur sequentially. Various contextual factors such as time and space, on-the-floor leader, appreciation,

feedback, and information influenced the contexts of tension, which enabled participants to shift resistive responses to generative responses. A novel influence that emerged in the study was the positive effect that participants gained through resistive withdrawal responses. Withdrawal strategies secured time and space and served as an enabler for some participants. It helped them gain stability and confidence before moving outward to others for help. In other words, a person whose initial response to tension was resistive could, with time and space, shift to a generative response.

Time and Space

Initial resistive responses reflected ways of coping with being overwhelmed. Although shutting down was an initial reaction to stop processing, the response of withdrawing appeared insightful because it secured time and space. It provided a context to assimilate information according to their learning needs in a calmer place. As a result, participants gained stability and confidence, which reduced tension and enabled them to reach outward to others for help.

Lois, who was a logical thinker, described the various response experiences she encountered.

For me, it's like, "get me out of here." I block and I need time to regroup, to problem solve in my head, to come up with a way. When you're overwhelmed, you sometimes have to withdraw, and then if you connect with other teachers, it can be helpful. That's all part of sorting through and assimilating the information and deciding how you're going to tackle it... part of your problem solving.

For Lois, her initial reaction of shutting down blocked the process; withdrawing then rewarded her time to gain control of the situation. Once she solved problems on her own, her level of tension reduced, which allowed her to connect with others to engage in joint problem solving.

On-the-Floor Leader

The uncertainty and momentum of external changes meant participants had to interpret new expectations without all the information. The implications of these circumstances forced inquiry, which for some was a difficult proposition. It often meant interacting with an administrator who was either mistrusted or not available. An interesting observation in the study was the presence of an on-the-floor leader, an informal leader who facilitated generative responses for others. The presence of such a person gave teachers a safe, secure place of inquiry.

Adelle, who saw herself as an information broker, described herself as a bridge between staff and administration. She believed she helped colleagues make decisions and take risks they were unwilling to make on their own.

I now share with other people when they come to me and they're just overwhelmed; I say to them, "Okay, look at what you're doing. What can you get rid of, because there's stuff there that you can get rid of."

Adelle said she gave some teachers "permission to look at the possibility of letting go. Even if they're not ready to make the step, they can at least look at it." She used the following analogy for letting go:

There's nothing wrong with letting go of some things. I said to them, "In your house, if you see a new chesterfield you like, you wouldn't put it into the

living room with everything else that's there." You need to get rid of something, and it's okay to do that in teaching. And in order to move on with what they're asking you to do, you have to do it, there is no other way.

Appreciation

Rosemary believed that "when people are going through change and there is tension, people want to feel safe and they want to feel secure ... they get that feeling of safety and security from their leader. They need to look toward somebody." Mary concurred with this belief and felt gestures such as "a pat on the back" helped tremendously during stressful times. She believed appreciation helped anchor the busyness and calmed tense situations. At the peak of giving up and giving in, Mary expected some show of gratitude from her administration. She said, "Coming down and just asking, 'How's it going?' Just that ... 'How is it going? How are things?' would have made a difference." Although her teaching partner would say, "You're doing a great job," it did not meet the expectation she had of administration.

Mary believed that appreciation consisted of the simple gestures she taught in kindergarten when discussing support, respect, and sharing with her JK/SK students. She reconciled the missing gestures of appreciation as naïveté on her part, but felt it was crucial as "it gets people jumping through hoops in situations that they may not otherwise." She believed, "If you want to get people to do a thing, that's what you do, to appreciate them." She expressed how important emotional support and encouragement were during stressful times.

I think something that really helps with tension and when we're in this kind of situation is to have people around you, whether it's your teaching partner or

administration or somebody who says, even at my age, even after all the teaching, “You know what? You’re doing a great job.” Or just those positive comments from parents or whatever, that’s huge, because you start to doubt yourself after you’ve gone through that. You’ll have really great years where you think you’re doing a great job here, and then you’ll have years like this where you doubt yourself.

In Mary’s case, her responses shifted between various resistive and generative strategies while dealing with extended periods of tension. At the start of the year, when it was most stressful, she gave up and gave in to survive the immediate demands of her large classroom. Over time, her strategies shifted to generative responses as she connected with her teaching partner. However, with little feedback and appreciation, her situation remained uncertain, which shifted her response back to escaping, to avoid another stressful year.

Feedback

Participants described feedback as an important element, especially when dealing with tension. The findings revealed there was an imbalance in the level of feedback between administrators and teachers. Many teachers discussed how important it was to hear from administrators that they were doing a good job. They believed positive feedback settled insecurities when many other factors related to their jobs were uncertain or unstable. Teachers identified colleagues, parents, and students as the primary sources of positive feedback.

Gregory, who felt very insecure about teaching a new subject, described the feedback he gained from a colleague.

When you have somebody that can assist you, you can run things by, and has the expertise, that decreases the stress level, and people telling you that you're doing a good job really helps ... because you don't get feedback and you don't know you're doing a good job, right?

Monica, who introduced a new reading/writing workshop to her students, talked about the exhilaration of student enthusiasm.

In the reading/writing workshop, the feedback was providing me with more energy in order to think of more things ... the kids would be so excited about one aspect that I could see something else. So it's like brainstorming, giving me a lot of wonderful ideas... there was a huge amount of excitement both for me and some of the kids ... I felt a lot of wonderful stuff, I felt pride, I felt excitement, I felt energy.

The positive feedback from students boosted Monica's confidence, which helped her gain energy to balance the negative energy surrounding her evaluation process. For Monica, who admitted to isolating herself emotionally during stressful times, positive feedback helped her feel confident about herself.

I suppose I was using so much energy to deal with the fear or the worries of [evaluation], it was a very negative tension. Where the other one [reading/writing workshop] the feedback was providing me with more energy in order to think of more things to do... I had reached that point of saying to myself, "I don't care what evaluation I get on this, I know it's working. I know that it is doing a good job. And I know that my kids are learning."

Teresa talked about various examples of feedback and appreciation she had received during her tenure as vice-principal.

I've always had a principal to bounce things off of to make sure that I'm doing it the right way ...[The principal] has been sort of preparing me for this for the last 2 years, and so I knew that whatever happened, I would have her support and she'd have lots of support on there, too. So she could get other people from the board to help me ... they were happy to do that, so yeah, she helped in that way and probably I've learned a lot from her about getting help from other people.

The unconditional support and feedback continued to give Teresa confidence while in the midst of her final interview for a position as principal.

Even while walking down the hall [to the interview], one of the superintendents who escorted me in by saying, "Don't be surprised, you're going to be fine" ... In fact, as I was going into the little office to prepare my presentation, the superintendent saw me and cheered me into the room. So you feel like, okay, no matter what I do in there, I know people respect me and there's a lot of confidence, and that has helped.

Rosemary talked about the importance of feedback throughout the months of closing her previous school. She explained that feedback and appreciation provided the emotional support and encouragement that kept her motivated.

Kids talking about the change and their new school in a positive way, in anticipation and excitement, hearing even parents saying, "Oh, I met so and so and I didn't even know that they lived around the corner." ... those things.

Hearing that from a few of the schools ... teachers and parents calling to say, "We would like to initiate this with your school." ... that was energizing. That's what kept me going, the support of teachers, of friends, of colleagues that would call me and, how are you doing? Or can we do this? Or retired colleagues that called ... those things help you get through that tension ... also knowing that I could, if need be, I could ask or turn to a number of people to help out. My superintendent was very supportive ... my supervisor provided a lot of emotional support and encouragement.

Overall, feedback served to calm emotional instability and helped participants gain assurance and confidence during stressful times. It is interesting that there was great disparity between teachers and administrators regarding the availability of feedback.

Information

A significant challenge was the uncertainty that accompanied change. It meant dealing with the implications of an incomplete picture. Although some participants appeared to manage ambiguity more successfully than others did, there were inevitable disruptions caused by missing or confusing information. Most participants described uncertainty as loss of control.

At the peak of her frustration, Mary acknowledged she did the best she could. Her plummet into tension coincided with the uncertainty of her circumstance.

I did go down and asked, and nothing, again, was done ... that was a huge bit of tension, and nothing. Well, I went down to the office and I said, "This is what I have, I don't know anyone could handle this." Yes, we're trying to do what we can. I know [principal], at one point, spoke to one of the other

teachers, but nothing came through [to me]. I'm apparently now going to get another EA for one of my other ones, but now we're in April and it's not needed. At the beginning of the year is when I was pulling my hair out, and it just takes forever to get anything done and I don't know anything.

For Mary, being in the loop would have settled the uncertainty of her situation. She described what being in the loop meant.

If she [principal] had said, "I've put numbers in. I am doing everything I can do. I can really appreciate what is going on. We're really trying our best down here to get that for you." ... just knowing and being in the loop would have helped.

Adelle believed information disseminated in parts, instead of the whole picture, created a lot of tension for many people. Her perception was that teachers needed to see the big picture to help them visualize how they fit into it. Adelle believed information helped teachers assume control and ownership of change to clarify tasks and problem solve. She admitted that when a situation was unknown or confusing to her, she usually had to "find out something; it's usually a piece of information that I don't have." She connected information to control, and despite her "willing [ness] to work with that ebb and flow as it goes," she knew it was difficult for others.

An Interpretative Perspective of Making Sense of Tension

The findings showed that participants had two dominant responses to tension: resistive and generative. Resistive responses represented various forms of disengagement that were dependent on the personal and institutional contexts of tension. As shown in Figure 4, resistive responses, internally enacted, formed a closed loop that reinforced tension and increased detachment. Conversely, generative responses, externally enacted, formed a loop that reinforced the institutional context, increased engagement, and had a positive influence on tension. Generative responses represented various forms of engagement which were dependent on the personal and institutional contexts of tension. Responses were not necessarily sequential but altered according to contextual factors. Both types of responses, further characterized by their properties and dimensions, provided details that distinguished specific strategies.

Resistive responses were personal strategies for coping with tension that did not involve others. When individuals responded resistively, they focused inwardly, detaching themselves from others. The various resistive responses fell on a spectrum of disengagement ranging from *shutting down* to *escaping*. Along the spectrum, *shutting down* was an initial response to being overwhelmed, where no cognitive processing occurred. *Withdrawal* was a strategy for securing time and space in order to assimilate information. *Giving up and giving in* was a strategy of shifting one's teaching standards to manage competing demands. *Escaping* was a strategy of changing the context of tension. Resistive responses generally consumed energy, reduced personal capacity, and limited opportunities for learning.

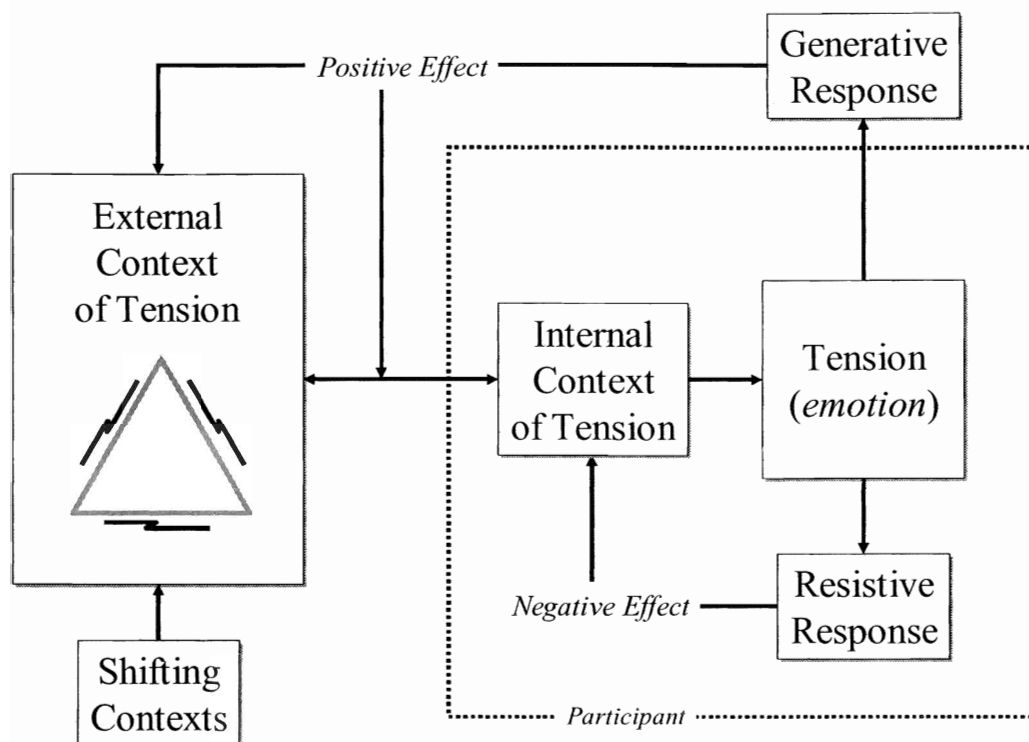


Figure 4. Making sense of tension.

Generative responses were interpersonal social strategies for coping with tension. When individuals responded generatively, they focused outwardly, engaging and involving others. Generative strategies reflected various levels of problem solving ranging from *connection with others* to *decision making*. *Connecting with others* was a response that allowed time to process information and emotions with others. *Risk-taking* was being vulnerable, a response that involved information seeking and confronting conflicts directly. *Decision making* involved reflection, critical thinking, and choice among competing demands. Generative responses were strategies of responding to tension that generated optimism, increased capacity, and enhanced opportunities for learning.

In some cases, changes in an institutional context shifted resistive responses to generative responses. Of interest, a withdrawal response had a similar positive effect on tension because time and space provided stability to shift responses. Additionally, factors provided through colleagues, students, parents, or a leader, which influences the institutional context, had a positive effect on tension and enabled participants to shift their responses. For example, *information* decreased uncertainty; *appreciation* helped reduce insecurity and doubt; *feedback* created certainty about job performance; an *on-the-floor leader* provided a safe place to inquire. These factors influenced both the internal and external context of tension, thereby enabling resistive responses to shift to generativity.

CHAPTER SIX: DISCUSSION AND IMPLICATIONS

The purpose of this study was to understand the dual nature of tension by exploring how teachers and administrators made sense of tension in the context of change. Exploring tension in the work activities and experiences associated with change provided new understanding of the context and conditions that shaped or constrained educational transformation. Through a multiphased research design that involved participant observations, interviews, and document analysis, I have developed a contextual understanding of tension that can help leaders with the design and implementation of educational change.

Summary of the Study

For the most part, responses to tension in the educational change literature have been viewed as objective outcomes of a deterministic process of change. Gitlin and Margonis (1995) point out that “politically motivated reforms have neglected the problems of implementation” (p. 377) and that successful reform focuses on engaging teachers. The dominant style of managing change initiatives has been to focus on engagement and to view resistance as a negative response—nonengagement. In doing so, the subjective understandings of resistance have largely been ignored because the focus has been directed at making external adjustments to authority and work conditions that facilitate engagement. Gitlin and Margonis point out that, by focusing on engagement, educational change researchers “overlook the good sense embedded in resistant acts” (p. 379). To focus the discourse of educational change on the notion of engagement or resistance as an either-or solution in my view positions educational change in objective, mechanistic terms, external to those who implement it. Capra

(2002) argues that mechanistic views fail to acknowledge the inherent tensions in human organizations that contribute to growth and development.

In this study, it was my intention to understand the subjective meaning of tension through an examination of individual experiences of change. In doing so, an interpretative theory of tension has been built that sheds light on the various contexts where tension exists. The intent of building an interpretative theory is not to generalize the findings of the study, but rather it is propositional in nature and provides the basis to critically reflect upon the existing body of educational literature.

A Contextual Understanding of Tension, in Figure 5, shows how tension is a phenomenon that is situated in the institutional, personal, emotional, and behavioural contexts in which it arises. As such, tension does not exist apart from the context to which it belongs. Understanding tension means examining the interactions between the institutional, individual, emotional, and behavioural contexts. As participants reflected upon the contradictions that impeded their ability to achieve change goals, they described the relations between various contexts. Teasing out these subjective views of tension required paying close attention to the various interactions. Goodson (2001) would probably agree, because he argues that to “analyze sustainability of change, we have to understand the conditions of change” (p. 52). He further states, “new models of educational change need to reinstate the balance between the internal affairs, the external relations, and the personal perspectives of change” (p. 54). In this study, the personal perspectives of tension described in the data differed at different levels of hierarchy, which is consistent with Fullan’s (1991) observation that “people actually experience change as distinct from how it might have been intended” (p. 4).

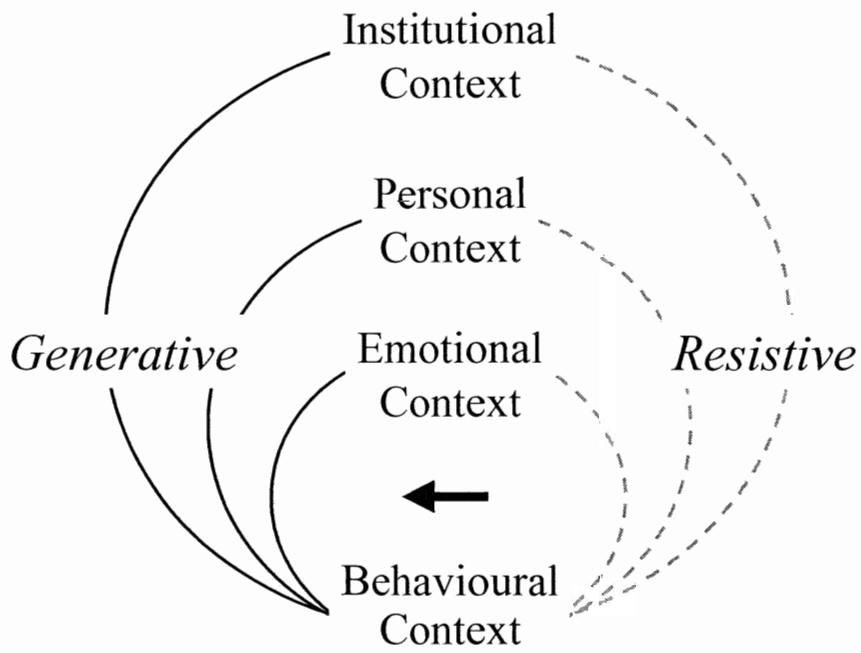


Figure 5. A contextual understanding of tension.

It was the subjective meanings of tension that helped to formulate a contextualized understanding of tension that underscores the complex nature of change.

The institutional context of tension consists of the cultural perspectives, the pace and momentum of change, and the various dimensions of change that disrupted the structures and activities in the school environment. Basic elements of school culture were revealed through the patterns of meanings that linked educational change ideas together. In other words, the subjective perspective of tension revealed the varying patterns of meaning underlying change. At times these patterns of meaning were in harmony, but often they were a source of conflict between individuals and groups owing to their ambiguity and uncertainty. Patterns of meaning were dramatically influenced by the momentum and pace of change, which further added to the uncertainty and ambiguity of the institutional background that shaped how teachers and administrators understood and interpreted tension.

The personal context of tension consists of the embedded values, assumptions, beliefs, and practical knowledge that form the basis of individuals' teaching practices. Embedded within individual teaching practice are the social memories and associated procedures, practices, and self-identity that accumulate over time. Accumulated life experiences also play a particularly important role in that they constrain or facilitate one's ability to negotiate tension and change.

Emotional context refers to feelings: the various manifestations of both resistance and generative responses as they inform perceptions. The emotions that were embedded in the working experiences emerged as participants described experiences of tension and change. Feelings of anger, fear, anxiety, and frustration were part of the patterns of meaning that shaped the perspectives of change and in turn shaped the individual and collective emotional responses to change. So too were feelings of achievement, meaning, and purpose that emerged as participants successfully negotiated the tensions and navigated the changes,

Taken together, the institutional, personal, and emotional contexts interacted continuously to shape the behavioural context of tension. Generally, resistive responses, shown in Figure 5 with a dotted line, interfered with change and were patterns of response that had a negative effect on tension. Conversely, generative responses, shown with a solid line, enhanced change and were patterns of response that had a positive effect on tension. The black arrow, within the emotional context circle implies the various contextual factors that enable participants to shift their resistive patterns of response to generative patterns. These contextual factors are key to managing change in a more comprehensive manner.

Discussion

The contextual understanding of tension provides the means to reinterpret resistance to change. It also helps to show or know how teachers and administrators reconstruct identities and make sense in context. Resistance has, for some time, been viewed negatively by people interested in educational change (Corbett et al., 1987). Although educational change researchers reflect different approaches to

implementation, Gitlin and Margonis (1995) argue that “successful reforms find ways to overcome resistance and encourage engagement” (p. 379). By far the most common view in the literature judges resistive teachers as conservative and unwilling to change (Lortie, 1975). However, some researchers have put forth a contrary opinion; Elmore (1987) and Gitlin and Margonis have both argued that the lack of voice for teachers within the educational decision-making authority leads to resistance and reluctance to participate. From their perspective, resistance and reluctance signal a system deficiency rather than one in the individual.

The results of this study confirm such types of institutional barriers to change but place them in a broader context. The individual and emotional contexts of tension influenced participants’ resistive acts. It is critical to appreciate that, for the most part, resistive acts were ways of preserving commitment and conserving a sense of professional worth, and not what might be superficially observed as nonengagement. In the short run, resistive withdrawal strategies provided people time and space to regain stability, which offered them a chance to reconstruct the meaning of change messages. These findings challenge the results of Gitlin and Margonis, who found that resisters who withdrew completely ended up being disengaged and actually protested the process of change. The findings from this study showed that resistance was an insightful strategy that enabled people to create an interpretative frame to make sense of change.

When participants encountered change ideas, the meanings and implications of particular ideas, approaches, or materials were not always self-evident. They had to construct an understanding of the change ideas to move forward with them. Resistive

acts meant that people initially needed time to construct these understandings alone. This result is contrary to Coburn's (2005) argument that teachers construct understandings of policy ideas in direct and indirect interactions with colleagues. She notes that when teachers construct ideas indirectly, "they draw on their understanding of what they saw or thought other teachers were doing" (p. 491). This interpretation of indirect interactions is inconsistent with the interpretation of shutting down and withdrawing found in this study. During these indirect strategies of resistance, teachers relied on their own means to assimilate, translate, and deconstruct information according to their own understanding of knowledge.

According to the data, resistance also presented itself on a collective level, through silence. As people described experiences of tension, the epistemological dilemmas they faced seeped out. These dilemmas were laden with emotional expressions of fear, frustration, and anger that shaped their resistance to tension and affected their personal and interpersonal capacity. Mitchell and Sackney (2000) note that "building personal capacity has to do with the active and reflective construction of knowledge that begins with confronting the values, assumptions, belief systems, and practices that individuals embrace" (p. 13). This study offers a further explanation: Individuals who were caught in the emotional context of fear and frustration became trapped in the contradictions between personal and interpersonal knowledge.

Their stories captured the personal dilemmas of living with conflicting narratives and competing stories. Clandinnin and Connelly (1995) contend that cover stories are developed and lived when teachers feel compelled to claim to know (or

show) but that the cover stories are not usually the real or favoured interpretation. Similarly, Argyris and Schön (1978) argue that at times professional action is caught between espoused theories and theory-in-use. These arguments support the present study, which demonstrated the heavy emotional load of self-deception as participants attempted to live out cover stories to sustain an outward countenance of knowing. Cover stories consumed energy, depleted capacity, and decreased opportunities for professional renewal. In a similar vein, Olson and Craig (2005) point out the missed educative opportunities of maintaining cover stories. The professional realities of these missed opportunities support Mitchell and Sackney (2000), who argue that “if embedded structures operate out of conscious awareness, then their influences on professional renewal is not open to scrutiny and their tacit operation could undermine professional learning opportunities” (p. 17). They go on to say, “deconstructing the embedded layers frees teachers to reconstruct their professional narrative in the face of deep mysteries or difficult problems” (p. 17). In this case, collective resistance locked individuals and groups of people in an inner/personal space where their energies were directed towards managing their inner emotions and their outer actions, which left them little capacity to reconstruct knowledge of change.

Reconstructing identity sheds light on the role that tension plays. The centrality of inner/personal concerns has been seen most recently in studies of educational change related to teacher identity. In their study of primary teachers, Woods and Jeffrey (2002) found that teachers have had to “reconstruct their identities in response to the reconstruction of the education system” (p. 89). Giddens (1991) argues that the current state of *late modernity* impacts on the self in unprecedented

ways. He further states, “these developments have brought about the separation of time and space, and the ‘disembedding’ or ‘lifting out’ of social relations from local contexts and their articulation across indefinite tracts of time-space” (p. 18).

Similarly, Menzies (2005) argues that the “space-time compression is a feature of our everyday lives that has resulted in numbing the senses” (p. 5). Together these contextual factors complicated and challenged teachers’ ability to generate identities in the face of constant change.

Snow and Anderson (1987) define identity work as “the range of activities individuals engage in to create, present, and sustain personal identities that are congruent with and supportive of the self-concept” (p. 1348). For several mid-to-latecareer teachers in this study, the reconstruction process was difficult and was often accompanied by strong negative feelings invoked by traumatic experiences of the public outcry against their profession. According to the data, these historically situated experiences collided with their perception of who they were, what they felt, what they faced, and what they were doing. These experiences conjured feelings of doubt and insecurity that affected their self-worth and made it harder for participants to generate new identities. These findings are consistent with the results of Woods and Jeffrey (2002), who found that teachers’ negative expressions had to be countered to negotiate consistency between self-concept and social identity.

The response pattern of *giving up and giving in* revealed that participants operated between an old identity and the expectations of a new social identity. This response strategy was largely emotional work where participants attempted to deal with dilemmas in the present. Similar findings were described by Woods and Jeffrey

(2002), who found that teachers responded to reform by “self-positioning where they summoned up their own reserves to refuse to embrace the new social identity and to assert the merits of their own favoured self-identity” (p. 99). Giving up and giving in meant people had to readjust their self-identities to keep both active, which constitutes some recognition that their old self-identity was not harmoniously intact. According to the data, the readjustment meant that they had to shift standards of practice to balance their selves and social roles. Particularly pertinent here are the findings of Goodson et al. (2006) that “teacher narratives reflected a pervasive and intense nostalgia for the past that was expressed in both social and political dimension” (p. 55). Their research reinforces the importance of understanding resistive acts amid the challenges confronted by educators to generate new social identities.

The identity work came more easily for those participants who were able to embrace a new social identity. The generative strategies that participants deployed all involved some form of alteration or separation of the self from the old identity and a subsequent shift into a new identity. Interrogating existing layers of knowledge and belief systems facilitated their identity reconstruction. The process of interrogation meant that participants managed the inner work of letting go of old patterns and practices and the outer work of connecting with others in search of explicit knowledge. These findings are consistent with those of Mitchell and Sackney (2000), who argue that “identity and expertise, together, shape an educator’s professional theory ... which is both an internal and an external search” (p. 17).

Making sense in context places importance on the conditions of change.

Educational scholars have long highlighted the importance of how educational policy is reconstructed and reshaped as it is implemented into schools (Tyack & Cuban, 1995), all of which has highlighted the importance of the social process of teacher learning and change. In her study of teacher sensemaking and change, Coburn (2005) found that teachers “come to understand new policy ideas through the lens of their preexisting knowledge and practices, often interpreting, adapting, or transforming policy messages as they put them in place” (p. 477). Similarly, Ericson (2001) argues that understanding an organization from a sensemaking perspective means “understanding how meaning is constructed and deconstructed” (p. 113). Drawing on sociological theories of sensemaking (Weick, 1995), researchers have argued that prior knowledge, the social context within which teachers work, and the nature of their connection to the reform together influence their ability to understand and enact policy reform (Coburn). According to Weick, action is based on how people notice or select information from the environment, make meaning of that information, and then act on those interpretations, developing cultures, social structures, and routines over time.

The present study demonstrated the crucial nature of the conditions under which teachers and administrators shaped meaning and understood change. Of particular importance was the centrality of discourse about how participants structured their own realities. According to the data, participants were confronted with a multiplicity of dynamic, overlapping, and competing discourses that influenced their pattern of response. Participants who resisted commented on the need for

processes of communication that would allow for more inclusive conversations; they highlighted a range of communication mediums based on a social constructionist approach. *Shutting down* and *withdrawal* were resistive strategies that allowed participants to withstand the pace of competing discourses and to secure more conducive contexts for processing change ideas. These findings are supported by Francis (2003), who argues that, “given the dynamic nature of language, meanings cannot be taken for granted” (p. 86). The results also showed that feedback and appreciation enabled participants to “jump through hoops” and settle their feelings of doubt. These findings are consistent with West et al. (2005), who also found that “supporting and motivating staff through acknowledgment and celebration of their work promotes their sense of being valued” (p. 88). In this study, teachers felt “a pat on the back” would have helped stabilize them and enable them to shift resistive response patterns to generative patterns.

The findings also revealed the need for time and space. The signal of distress was the search for time as participants described it as an object to locate rather than the experiences that gave it shape and meaning. Hargreaves and Fink (2006) also found that the pace and priorities of reform have left teachers with no time or flexibility to respond to the needs of their students. Resistive responses were strategies that secured time and space and allowed participants a point of stability that often enabled them to reconnect with others. These findings support those of Francis (2003), who found that creating more time and space for review and reflection “entailed a shift in managerial thinking about the role of talk in managerial work and

the process of change” (p. 85). Securing time and space shaped how participants were able to understand and interpret change messages.

Implications for Educational Change

The contextual interpretation of tension revealed the importance of understanding the broad environment in which tension arises. The subjective understanding of what tension meant to teachers and administrators influenced their responses to change. The implications of these findings point to the necessity for educational leaders to create the institutional, personal, and emotional conditions that focus on the change process and its implications for teaching and learning. As the findings have shown, teachers who resist are more likely to engage in change efforts if the conditions of change take into account their personal meanings of change.

There are also related implications for administrative education in the theory and practice of educational administration. The contextual importance of tension and its influence on school change reinforces the importance of school leaders in building discourses that help people talk about and deal constructively with the tensions they encounter in their professional lives. The results emphasize the role of leaders in recognizing and rebuilding the commitment embedded within teachers’ resistive acts so they can reclaim the unreflective bases of professional practice; this is a positive implication but only if resistive behaviours can first be seen as a strategy for success.

The study findings strongly support the role of informal and formal leaders in constructing the conditions for change that enable people to transition meaning more easily. The findings also reinforce the role of school leaders in building a sense of identification, achievement, and connectedness with people that acknowledges all

perspectives from all levels of the organization and various functional roles. This finding is supported by Coburn (2005), who points out that “principals influence teachers’ enactment of policy ideas by participating in the social process of interpretation and adaptation and creating the conditions for teacher learning” (p. 476). Hargreaves and Fink (2006) also argue that sustainable leadership “revisits and revives organizational memories and honours the wisdom of memory bearers as a way to learn from, preserve, and then move beyond the best of the past” (p. 20).

These results suggest a role for school leaders in supporting the emotional dimensions of change and in rebalancing and restabilizing resources across levels of hierarchy. Given the importance of discourse in the process of change, these findings support the role of leaders in actively building common language across different groups of individuals to allow people to handle tension more creatively. As Hargreaves and Fink (2006) have argued, trust, confidence, and emotion are three sources of renewal.

Teacher training is typically silent on issues of tension in normal working conditions, which leaves teachers ill prepared for change. The results of this study support the role of teacher education programs to prepare preservice teachers for the realities of life in schools and in particular in providing programs that target specific skill development that enables the reconstruction of professional narratives. These results emphasize the centrality of teaching philosophy as an integral dimension of educational change.

These findings reinforce the role of professional development to prepare all teachers for the realities of contemporary life in schools and in particular to provide

experiential staff development opportunities that enable teachers to voice the subjective meanings of change initiatives. This study stresses the crucial role of adaptative professional development where the learning needs of teachers are more closely scanned to understand the learning needs that support leadership skills for teachers (e.g., decision-making, risk-taking, prioritizing).

Future Research

There is a need to undertake more systematic work in the area of tension within schools during periods of change. To this end, some areas for future investigation might be as follows. What are the organizational contexts that give rise to tension? How do all those involved in school life negotiate tensions? Are patterns of tensions different in different kinds of schools—primary/secondary, urban/rural? How do teachers and students manage and negotiate tensions? How does occupational tension explain how meanings of professional identities are altered, reframed, reformed? What individual identity factors influence resistance and generative responses? How does resilience facilitate negotiation of tension? How do various learning group configurations contribute to or constrain tension?

There is also a need to understand the emotional management of tension during times of school change. Accordingly, some areas for future study are as follows. What organizational conditions contribute to successful change? What leadership strategies affect rate of change?

Final Reflections

Understanding how teachers and administrators make sense of tension sheds light on the contextual intricacies of educational change. Tension as a phenomenon

that exists in context, which implies the power of sustainable change, resides in its institutional, personal, emotional, and behavioural conditions. The instability points where expressions of tension, uncertainty, and doubt are experienced become critical components for growth and development. It is this delicate balance point between instability and emergence that helps us understand the role of leadership. For leaders to facilitate successful change, they must connect with individual teachers and create the conditions that build commitment and dignify their contribution.

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Appendix A

Interview Guide: Phase 2

1. Can you briefly describe the history of change within your school/school district?
2. Can you provide the background information about the specific change initiative—rationale, purpose, expected outcomes, challenges, benefits?
3. What is your perception of how change has impacted your school/school district?
4. What process is followed when introducing a school change?
5. What are the challenges of introducing change initiatives in your school district/school?
6. What educational changes have had the greatest impact on your school district/school in the past 2 years? Why?
7. Have there been any tensions associated with introducing change? What kinds of tensions?
8. Have these tensions created barriers to change? Have tensions created a catalyst to change? Describe each in detail.
9. Were there any barriers (e.g., organizationally, culturally) to implementing this change?
10. What kinds of impacts have these changes had on school district/schools?
11. Have any procedures, policies, or structures (e.g., accountability) been altered to accommodate this change?
12. How would you describe the culture of your school district/school?
13. How would you describe the morale within schools in your district?
14. Can you describe the school board/school organizational structure? How does it function? Did it need to be altered to accommodate this change? What is the relationship between the school district and the individual schools during change?
15. How would you describe the relations between the school district/school and parents and the community? Has this changed in the recent past?
16. Are resources allocated to introduce change initiatives? If yes, how does it work? What resources were allocated to implement this change? What kinds of resources are allocated?
17. Who are the key stakeholders?
18. What is the vision of the school district/school?

19. Was the work of school personnel disrupted at any time while implementing this change?
20. Request to obtain any documentation related to the specific school change that is identified (any documentation related to specific change; school documents related to procedures, organizational structure, policies, staff meeting minutes involving discussion about school change)

Appendix B

Interview Guide: Phase One

1. Within the past 2 years, what educational change initiative has had the greatest impact on school personnel?
2. In what ways has this change affected you, your work activity, and your school environment?
3. What word would you use to describe your experience of this change?

Appendix C

Interview Guide: Phase 4

1. Identified Change:

2. The goal of the final interview is to understand how you experience tension. Please try to think about the tension you identified during your first interview and reflect upon the following questions:
 - What did you feel while experiencing tension?
 - What were your thoughts while experiencing tension?
 - What expectations did you anticipate while experiencing tension?
 - What did you think to do? And did? But didn't—why?
 - What stopped you?
 - What helped you?

Appendix D: Ethics Approval



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DATE: Thursday, September 09, 2004

FROM: Linda Rose-Krasnor, Chair
Research Ethics Board (REB)

TO: Coral Mitchell, Education
FENTON, Nancy

FILE: 04-022 - FENTON

TITLE: Making Sense of Tension: Understanding how Teachers and Administrators Respond to Tension of Change

The Brock University Research Ethics Board has reviewed the above research proposal.

DECISION: Accepted as Clarified

This project has been approved for the period of **September 09, 2004** to **May 31, 2005** subject to full REB ratification at the Research Ethics Board's next scheduled meeting. The approval may be extended upon request. *The study may now proceed.*

Please note that the Research Ethics Board (REB) requires that you adhere to the protocol as last reviewed and approved by the REB. The Board must approve any modifications before they can be implemented. If you wish to modify your research project, please refer to www.BrockU.CA/researchservices/forms.html to complete the appropriate form **REB-03 (2001) Request for Clearance of a Revision or Modification to an Ongoing Application**.

Diverse or unexpected events must be reported to the REB as soon as possible with an indication of how these events affect, in the view of the Principal Investigator, the safety of the participants and the continuation of the protocol.

Research participants are in the care of a health facility, at a school, or other institution or community organization, it is the responsibility of the Principal Investigator to ensure that the ethical guidelines and approvals of those facilities or institutions are obtained and filed with the REB prior to the initiation of any research protocols.

The Tri-Council Policy Statement requires that ongoing research be monitored. A Final Report is required for all projects, with the exception of undergraduate projects, upon completion of the project. Researchers with projects lasting more than one year are required to submit a Continuing Review report annually. The Office of Research Services will contact you when this form **REB-02 (2001) Continuing Review/Final Report** is required.

Please quote your REB file number on all future correspondence.